



# 2018 Citrus Export Production Estimates and Forecast Projections

*Strategic outlook on shipping, logistics &  
infrastructure aligned to volume growth*

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# Map of Fruit Production in SA

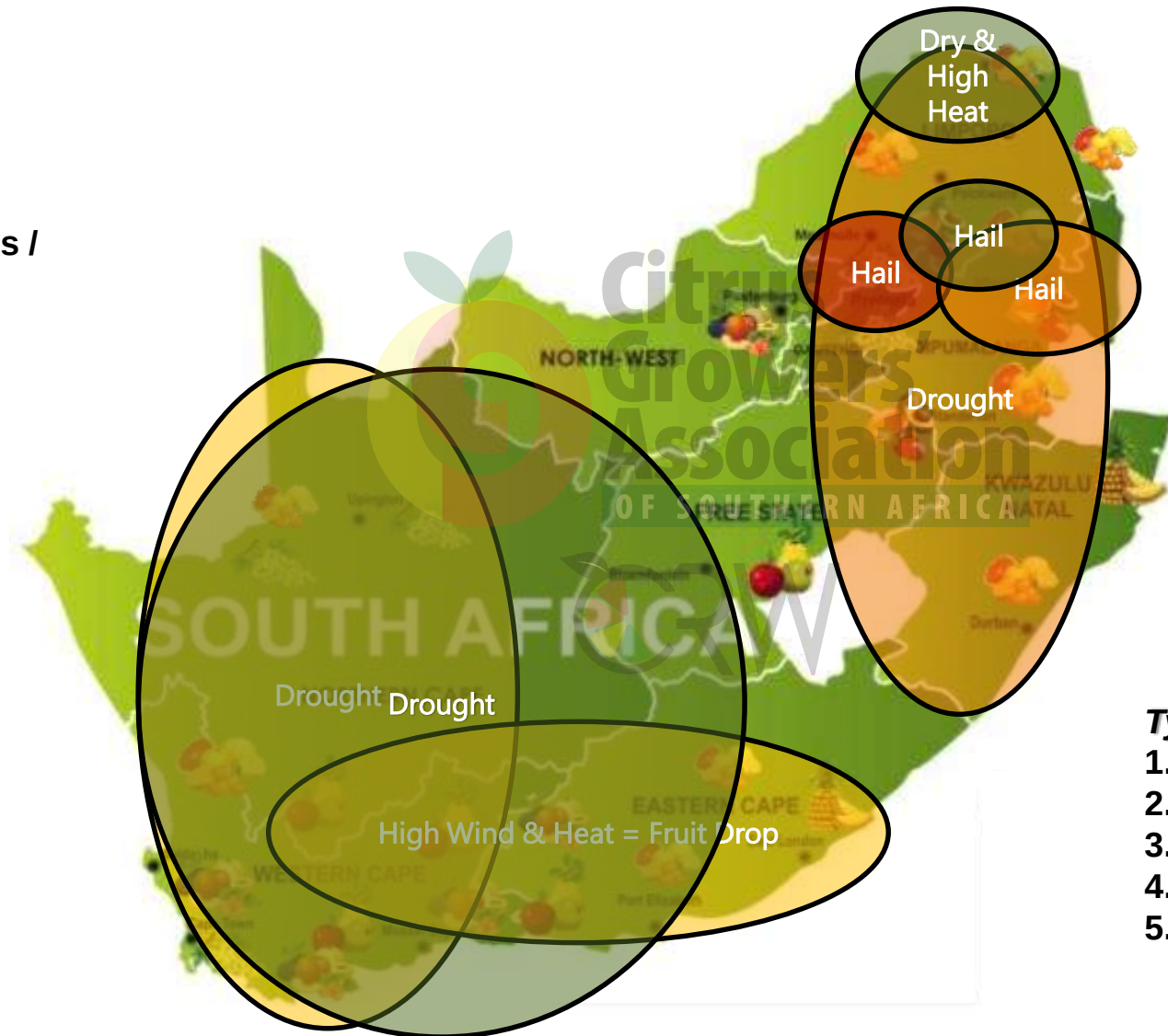
*The 3 key citrus production and export corridors must be considered independently for logistics purposes*



# Factors Affecting Production Volume

## *Typical Climatic –*

1. Drought
2. High Heat
3. Hail
4. Tropical Storms / Floods
5. Frosting



**Major-**  
**2015**  
**2016**  
**2017**  
**2018**

## *Typical Other –*

1. Supply & Demand
2. Market Prices
3. Fruit Quality & Size
4. Phytosanitary
5. Political



***Production volume can change from one season to the next and in the long term***

# 2018 Export Production Est. by Region

## ***Disclaimer***

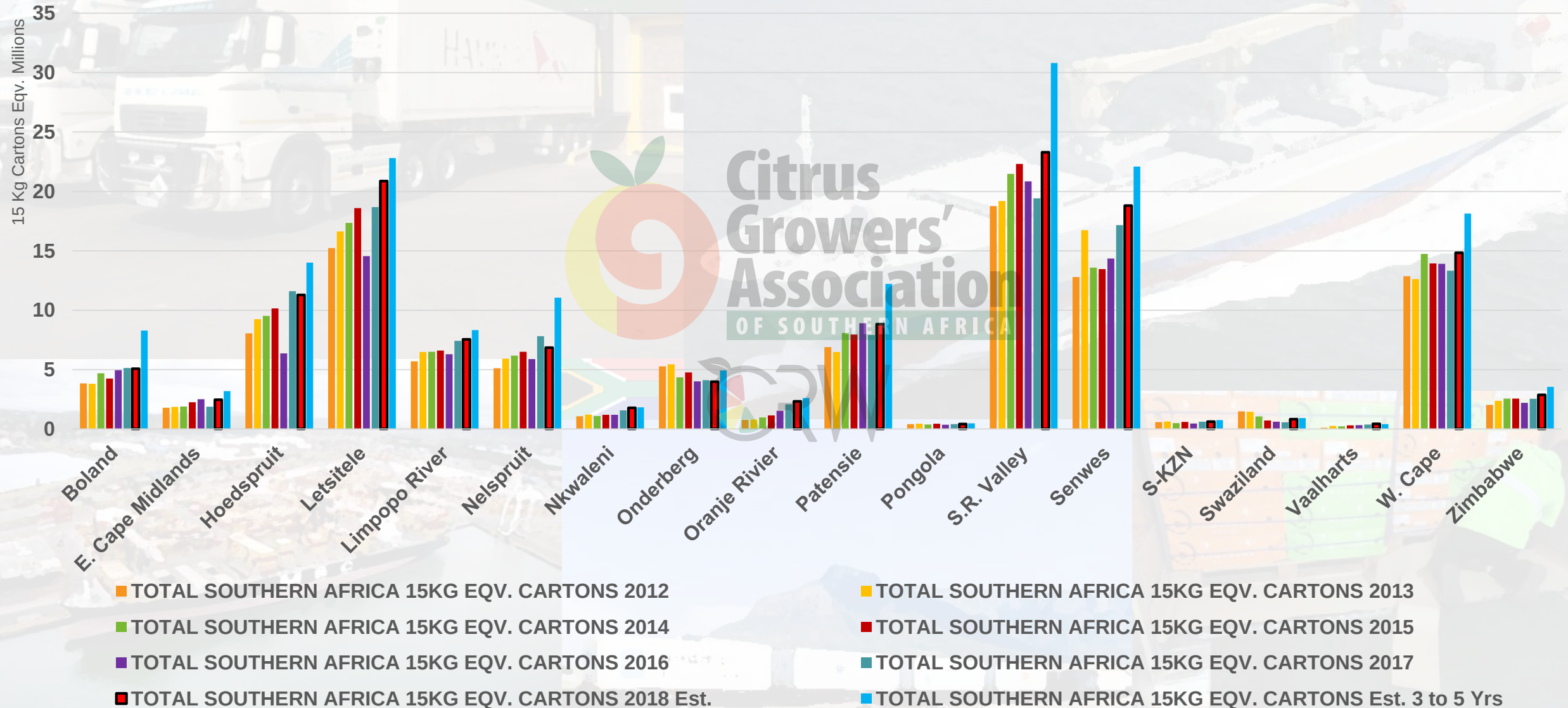
- ***Historical data supplied by PPECB.***
- ***Volume projections, capacity and infrastructure forecasts' are based on expected volume growth as a result of tree plantings.***
- ***Volume projections may or may not materialize, stakeholders are urged to monitor production volume year on year.***
- ***Data is provided in good faith with the express condition that the CGA cannot be held responsible for the use of the data.***

# 2018 Citrus Export Production Estimates

| TOTAL SOUTHERN AFRICA 15KG EQV. CARTONS |                    |                    |                    |                    |                    |                    |                    |               |               |             |                |                   |                    |
|-----------------------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------|---------------|-------------|----------------|-------------------|--------------------|
| Cga Region                              | 2012               | 2013               | 2014               | 2015               | 2016               | 2017               | 2018 Est.          | Ha <4 Yrs     | Ha Total      | % Ha <4 Yrs | % Vol Increase | Vol Increase      | Est. 3 to 5 Yrs    |
| Unknown                                 |                    |                    |                    |                    |                    |                    |                    |               |               |             |                | -                 | -                  |
| Boland                                  | 3 840 756          | 3 806 072          | 4 693 675          | 4 252 485          | 4 945 545          | 5 129 352          | 5 069 000          | 1 581         | 4 080         | 39%         | 63%            | 3 180 107         | 8 284 144          |
| E. Cape Midlands                        | 1 786 820          | 1 860 220          | 1 889 524          | 2 256 655          | 2 501 372          | 1 879 678          | 2 460 000          | 362           | 1 941         | 19%         | 23%            | 685 340           | 3 197 580          |
| Hoedspruit                              | 8 052 939          | 9 252 818          | 9 517 119          | 10 143 016         | 6 363 659          | 11 606 218         | 11 288 500         | 1 326         | 5 822         | 23%         | 30%            | 2 390 331         | 13 996 549         |
| Letsitele                               | 15 240 763         | 16 638 614         | 17 339 995         | 18 598 447         | 14 558 542         | 18 685 391         | 20 873 490         | 1 864         | 10 817        | 17%         | 21%            | 3 798 074         | 22 812 057         |
| Limpopo River                           | 5 702 523          | 6 477 433          | 6 494 702          | 6 598 011          | 6 291 297          | 7 421 453          | 7 541 250          | 520           | 4 105         | 13%         | 14%            | 903 426           | 8 324 879          |
| Nelspruit                               | 5 115 969          | 5 927 044          | 6 180 527          | 6 491 168          | 5 882 897          | 7 806 693          | 6 848 463          | 1 443         | 4 921         | 29%         | 41%            | 3 005 711         | 11 050 084         |
| Nkweleni                                | 1 076 055          | 1 213 489          | 1 083 645          | 1 189 677          | 1 193 463          | 1 565 172          | 1 782 400          | 33            | 1 101         | 3%          | 3%             | 31 215            | 1 825 000          |
| Onderberg                               | 5 270 715          | 5 442 625          | 4 353 115          | 4 767 171          | 4 001 156          | 4 116 796          | 3 987 900          | 394           | 2 757         | 14%         | 17%            | 563 556           | 4 934 309          |
| Oranje Rivier                           | 773 134            | 806 874            | 967 228            | 1 140 777          | 1 540 489          | 2 080 223          | 2 329 645          | 189           | 1 016         | 19%         | 23%            | 298 653           | 2 611 267          |
| Patensie                                | 6 889 134          | 6 489 732          | 8 081 512          | 7 944 868          | 8 897 446          | 7 920 429          | 8 828 634          | 1 475         | 5 328         | 28%         | 38%            | 3 137 933         | 12 211 162         |
| Pongola                                 | 415 641            | 441 959            | 375 091            | 441 095            | 364 888            | 415 863            | 425 550            | 0             | 193           | 0%          | 0%             | 0                 | 472 722            |
| S.R. Valley                             | 18 758 893         | 19 195 515         | 21 476 031         | 22 316 372         | 20 838 351         | 19 418 390         | 23 299 050         | 3 653         | 13 432        | 27%         | 37%            | 7 131 398         | 30 799 686         |
| Senwes                                  | 12 795 021         | 16 737 724         | 13 573 871         | 13 464 014         | 14 340 494         | 17 154 354         | 18 804 164         | 1 918         | 10 181        | 19%         | 23%            | 4 171 280         | 22 082 849         |
| S-KZN                                   | 572 843            | 626 650            | 501 915            | 604 584            | 458 053            | 611 862            | 630 000            | 91            | 479           | 19%         | 23%            | 112 299           | 746 256            |
| Swaziland                               | 1 484 000          | 1 454 000          | 1 060 000          | 719 660            | 622 000            | 562 115            | 825 000            | 130           | 735           | 18%         | 21%            | 105 100           | 921 100            |
| Vaalharts                               | 104 349            | 258 177            | 213 139            | 312 036            | 329 627            | 368 340            | 430 000            | 33            | 283           | 12%         | 13%            | 45 963            | 414 303            |
| W. Cape                                 | 12 867 918         | 12 626 847         | 14 746 084         | 13 934 100         | 13 909 040         | 13 320 416         | 14 825 607         | 2 427         | 9 835         | 25%         | 33%            | 3 569 659         | 18 128 990         |
| Zimbabwe                                | 2 035 000          | 2 376 280          | 2 559 330          | 2 558 200          | 2 196 900          | 2 546 900          | 2 875 590          | 362           | 1 964         | 18%         | 23%            | 675 743           | 3 547 943          |
| <b>Grand Total</b>                      | <b>102 782 473</b> | <b>111 632 073</b> | <b>115 106 503</b> | <b>117 732 337</b> | <b>109 235 219</b> | <b>122 609 644</b> | <b>133 124 243</b> | <b>17 801</b> | <b>78 991</b> | <b>23%</b>  | <b>29%</b>     | <b>33 805 789</b> | <b>166 360 881</b> |
| Northern Region                         | 57 761 469         | 66 588 636         | 63 039 310         | 65 575 042         | 56 273 349         | 72 492 816         | 75 882 307         | 8 081         | 43 075        | 19%         | 23%            | 15 756 737        | 90 713 749         |
| E Cape Region                           | 27 539 196         | 27 803 644         | 31 660 206         | 32 829 931         | 32 566 796         | 29 586 837         | 35 017 684         | 5 523         | 20 984        | 26%         | 36%            | 11 000 634        | 46 622 731         |
| W & N Cape Region                       | 17 481 808         | 17 239 793         | 20 406 987         | 19 327 363         | 20 395 074         | 20 529 991         | 22 224 252         | 4 197         | 14 931        | 28%         | 39%            | 7 048 418         | 29 024 400         |

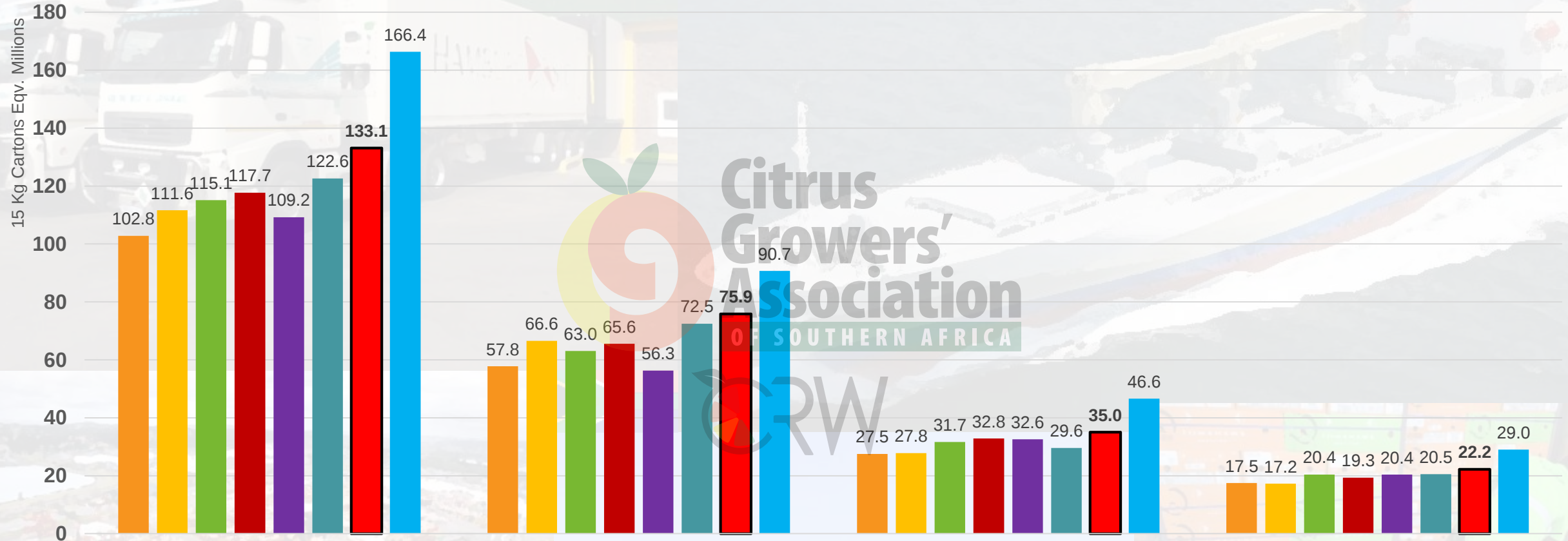
# 2018 Export Production Est. by Region

Total Southern Africa Export Production by Region



# 2018 Export Production Est. by Region

Total Southern Africa Export Production by Corridor



- TOTAL SOUTHERN AFRICA 15KG EQV. CARTONS 2012
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- TOTAL SOUTHERN AFRICA 15KG EQV. CARTONS 2017
- TOTAL SOUTHERN AFRICA 15KG EQV. CARTONS 2018 Est.

- TOTAL SOUTHERN AFRICA 15KG EQV. CARTONS 2012
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- TOTAL SOUTHERN AFRICA 15KG EQV. CARTONS 2017
- TOTAL SOUTHERN AFRICA 15KG EQV. CARTONS Est. 3 to 5 Yrs



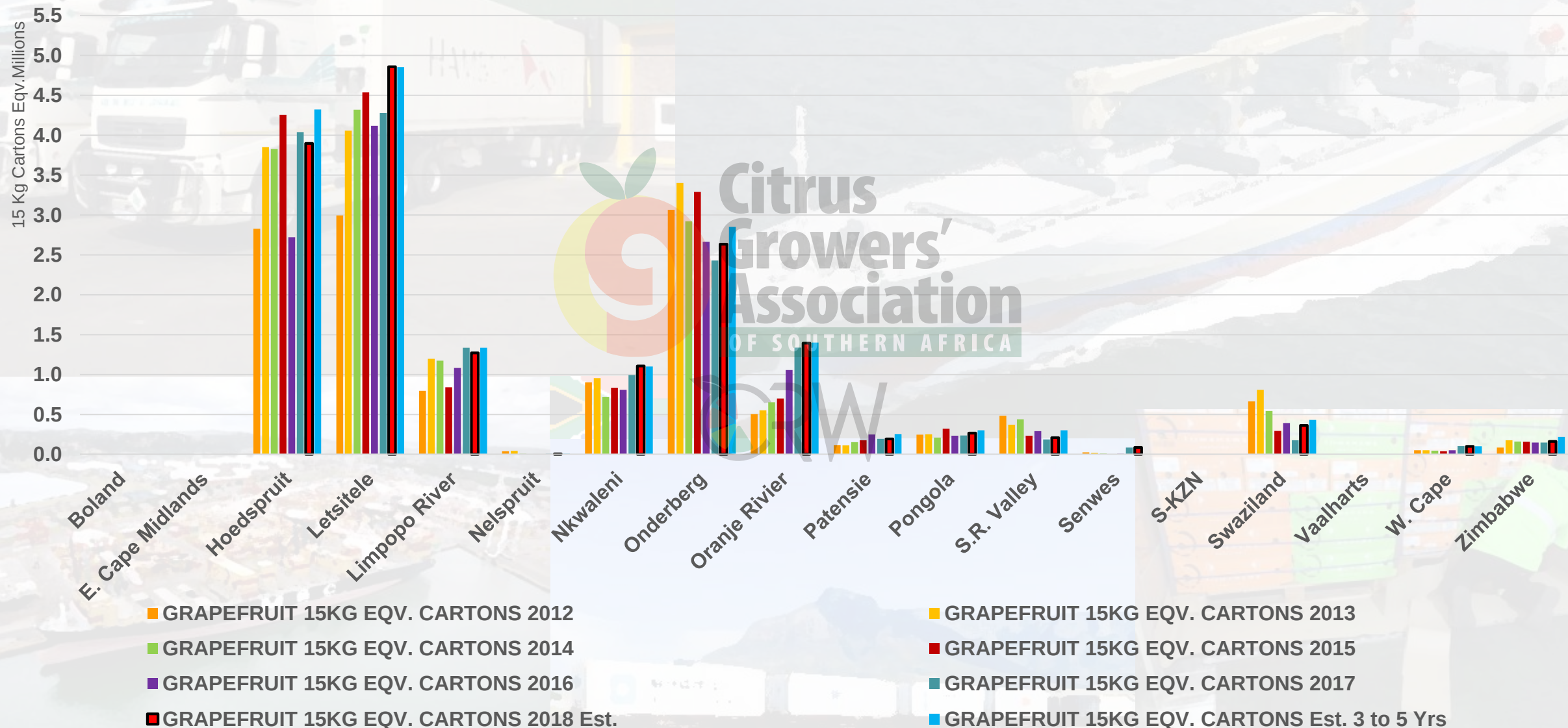
# 2018 Citrus Export Production Estimates

| GRAPEFRUIT 15KG EQV. CARTONS |            |            |            |            |            |            |            |           |          |             |                |              |                 |
|------------------------------|------------|------------|------------|------------|------------|------------|------------|-----------|----------|-------------|----------------|--------------|-----------------|
| Cga Region                   | 2012       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018 Est.  | Ha <4 Yrs | Ha Total | % Ha <4 Yrs | % Vol Increase | Vol Increase | Est. 3 to 5 Yrs |
| Unknown                      | 27 079     | 16 179     | 23 124     | 24 190     |            |            |            |           |          |             |                |              |                 |
| Boland                       | 2 367      | 32         | 299        | 2 364      | 1 097      | 63         |            |           |          |             |                |              |                 |
| E. Cape Midlands             |            |            |            |            |            | 17         |            |           |          |             |                |              |                 |
| Hoedspruit                   | 2 827 920  | 3 851 874  | 3 828 901  | 4 254 858  | 2 721 920  | 4 040 804  | 3 898 500  | 154       | 1 726    | 9%          | 7%             | 282 856      | 4 323 660       |
| Letsitele                    | 2 994 822  | 4 058 926  | 4 322 137  | 4 537 410  | 4 117 819  | 4 279 027  | 4 859 000  | 191       | 2 083    | 9%          | 7%             | 317 619      | 4 855 028       |
| Limpopo River                | 796 320    | 1 196 036  | 1 174 055  | 839 011    | 1 082 743  | 1 334 548  | 1 271 250  |           | 613      | 0%          | 0%             |              | 1 334 548       |
| Nelspruit                    | 36 999     | 41 862     | 6 425      | 1 032      | 878        | 5 519      | 5 000      |           |          |             |                |              | 5 519           |
| Nkwaleni                     | 902 316    | 954 069    | 719 659    | 834 278    | 808 659    | 993 299    | 1 107 400  |           | 597      | 0%          | 0%             |              | 1 100 000       |
| Onderberg                    | 3 066 066  | 3 400 617  | 2 923 077  | 3 288 565  | 2 664 680  | 2 428 912  | 2 632 900  | 113       | 1 614    | 7%          | 7%             | 186 528      | 2 851 208       |
| Oranje Rivier                | 503 641    | 550 650    | 653 028    | 700 067    | 1 055 489  | 1 337 044  | 1 392 785  |           | 394      | 0%          | 0%             |              | 1 400 000       |
| Patensie                     | 115 567    | 114 530    | 151 167    | 176 108    | 249 633    | 194 180    | 192 100    | 1         | 81       | 1%          | 1%             | 3 120        | 252 753         |
| Pongola                      | 246 574    | 250 911    | 208 809    | 321 297    | 233 350    | 235 507    | 265 550    |           | 98       | 0%          | 0%             |              | 300 000         |
| S.R. Valley                  | 484 121    | 371 921    | 438 932    | 233 761    | 290 271    | 187 323    | 209 050    |           | 108      | 0%          | 0%             |              | 300 000         |
| Senwes                       | 23 769     | 17 886     | 8 092      | 411        | 6 324      | 85 026     | 85 000     |           |          |             |                |              |                 |
| S-KZN                        |            | 275        |            | 235        | 5          |            |            |           |          |             |                |              |                 |
| Swaziland                    | 662 000    | 808 000    | 542 000    | 294 000    | 391 000    | 175 000    | 363 000    | 80        | 500      | 16%         | 10%            | 39 100       | 430 100         |
| Vaalharts                    |            |            |            |            |            |            |            |           |          |             |                |              | -               |
| W. Cape                      | 51 097     | 50 292     | 46 348     | 37 749     | 51 823     | 101 895    | 100 000    |           |          |             |                |              | 100 000         |
| Zimbabwe                     | 85 000     | 176 280    | 159 330    | 158 200    | 146 900    | 146 900    | 161 590    | 32        | 118      | 27%         | 37%            | 58 865       | 217 065         |
| Grand Total                  | 12 825 658 | 15 860 340 | 15 205 383 | 15 703 537 | 13 822 591 | 15 545 063 | 16 543 125 | 571       | 7 932    | 7%          | 8%             | 888 088      | 17 469 882      |
| Northern Region              | 11 641 786 | 14 756 736 | 13 892 485 | 14 529 296 | 12 174 278 | 13 724 541 | 14 649 190 | 570       | 7 349    | 8%          | 8%             | 884 968      | 15 417 128      |
| E Cape Region                | 599 688    | 486 451    | 590 099    | 409 869    | 539 904    | 381 520    | 401 150    | 1         | 189      | 1%          | 1%             | 3 120        | 552 753         |
| W & N Cape Region            | 557 105    | 600 974    | 699 675    | 740 181    | 1 108 409  | 1 439 002  | 1 492 785  | -         | 394      | 0%          | 0%             | -            | 1 500 000       |



# 2018 Citrus Export Production Estimates

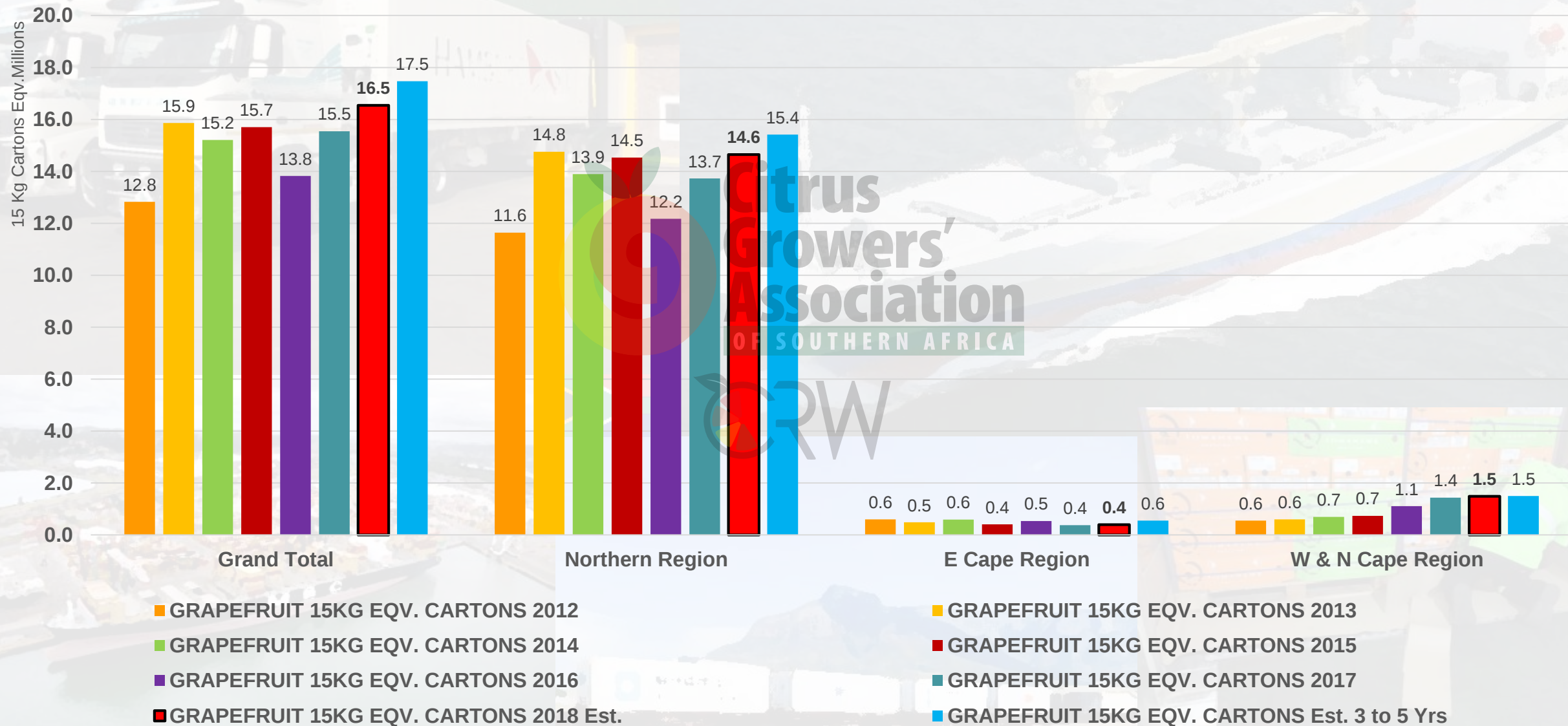
Grapefruit Export Production by Region





# 2018 Citrus Export Production Estimates

Grapefruit Export Production by Corridor



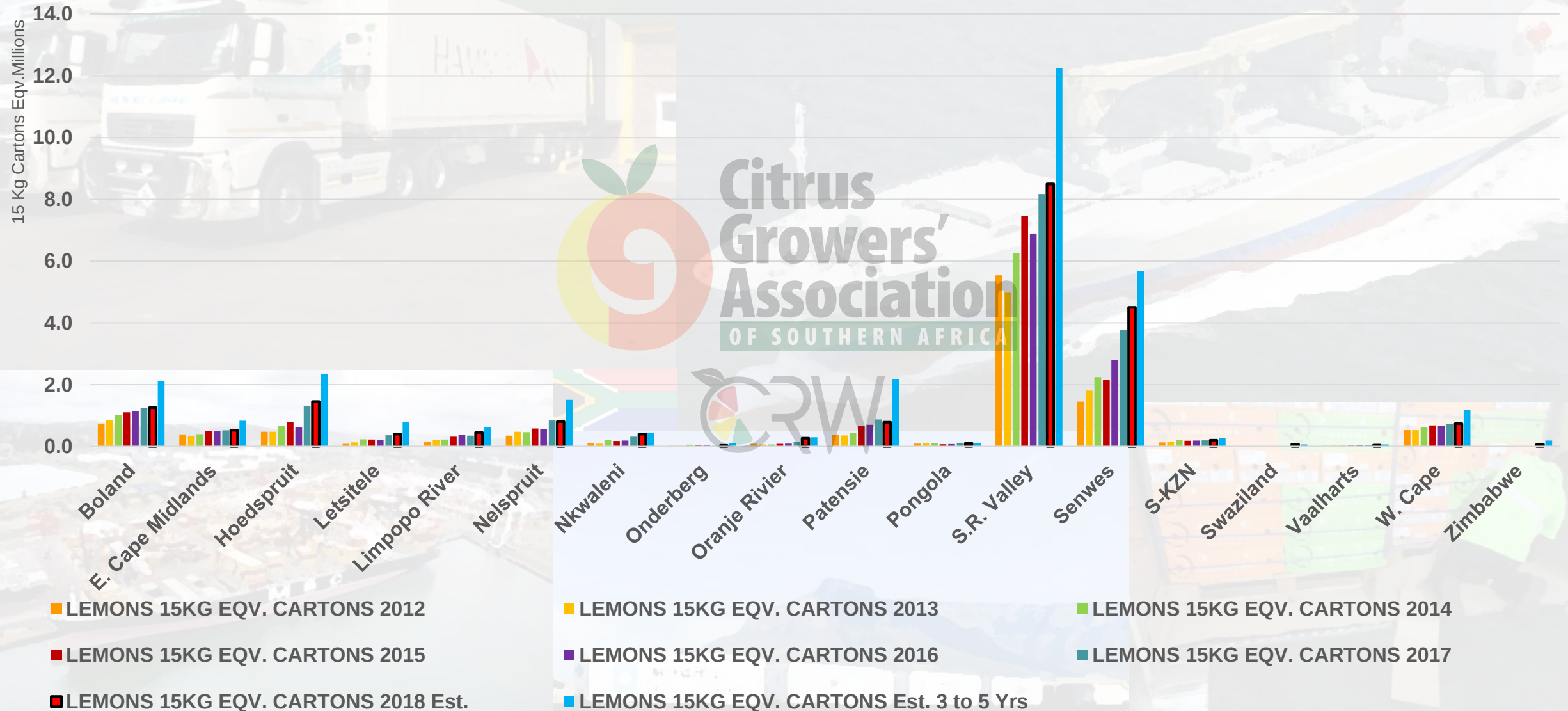


# 2018 Citrus Export Production Estimates

| LEMONS 15KG EQV. CARTONS |            |            |            |            |            |            |            |           |          |             |                |              |                 |
|--------------------------|------------|------------|------------|------------|------------|------------|------------|-----------|----------|-------------|----------------|--------------|-----------------|
| Cga Region               | 2012       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018 Est.  | Ha <4 Yrs | Ha Total | % Ha <4 Yrs | % Vol Increase | Vol Increase | Est. 3 to 5 Yrs |
| Unknown                  |            |            |            |            |            |            |            |           |          |             |                | -            | -               |
| Boland                   | 740 420    | 857 682    | 1 008 645  | 1 105 901  | 1 144 696  | 1 246 011  | 1 250 000  | 337       | 769      | 44%         | 70%            | 872 208      | 2 118 219       |
| E. Cape Midlands         | 389 348    | 335 513    | 396 645    | 507 040    | 485 905    | 520 620    | 525 000    | 113       | 287      | 40%         | 60%            | 312 372      | 832 992         |
| Hoedspruit               | 471 735    | 471 826    | 668 090    | 776 728    | 615 079    | 1 307 508  | 1 450 000  | 558       | 1 132    | 49%         | 80%            | 1 046 006    | 2 353 514       |
| Letsitele                | 80 839     | 126 360    | 225 989    | 223 255    | 215 290    | 360 559    | 395 000    | 219       | 342      | 64%         | 120%           | 432 671      | 793 230         |
| Limpopo River            | 136 728    | 205 425    | 219 135    | 317 613    | 365 708    | 350 698    | 450 000    | 210       | 436      | 48%         | 80%            | 280 558      | 631 256         |
| Nelspruit                | 345 891    | 471 838    | 461 433    | 583 325    | 559 587    | 838 901    | 800 000    | 195       | 422      | 46%         | 80%            | 671 121      | 1 510 022       |
| Nkwaleni                 | 97 606     | 88 421     | 203 398    | 178 616    | 190 729    | 312 154    | 400 000    | 33        | 278      | 12%         | 10%            | 31 215       | 450 000         |
| Onderberg                | 18 915     | 17 475     | 53 979     | 32 289     | 27 096     | 17 865     | 30 000     | 31        | 34       | 91%         | 500%           | 89 325       | 107 190         |
| Oranje Rivier            | 84 258     | 64 738     | 64 370     | 83 390     | 88 762     | 133 485    | 266 000    | 15        | 86       | 17%         | 120%           | 160 182      | 293 667         |
| Patensie                 | 383 144    | 357 500    | 444 655    | 653 680    | 698 184    | 873 967    | 780 000    | 427       | 663      | 64%         | 150%           | 1 310 951    | 2 184 918       |
| Pongola                  | 90 429     | 108 389    | 101 450    | 67 469     | 76 051     | 112 722    | 100 000    |           | 54       | 0%          | 0%             |              | 112 722         |
| S.R. Valley              | 5 541 982  | 4 975 938  | 6 257 901  | 7 472 007  | 6 892 667  | 8 173 272  | 8 500 000  | 1 710     | 4 360    | 39%         | 50%            | 4 086 636    | 12 259 908      |
| Senwes                   | 1 448 871  | 1 808 962  | 2 246 824  | 2 145 251  | 2 802 391  | 3 784 129  | 4 500 000  | 723       | 1 966    | 37%         | 50%            | 1 892 065    | 5 676 194       |
| S-KZN                    | 129 198    | 157 461    | 201 798    | 180 614    | 188 529    | 192 318    | 200 000    | 45        | 158      | 29%         | 40%            | 77 013       | 269 331         |
| Swaziland                |            |            |            |            |            |            | 66 000     | 50        | 75       | 67%         | 100%           | 66 000       | 66 000          |
| Vaalharts                | 17 177     | 24 807     | 25 383     | 22 882     | 28 049     | 43 360     | 40 000     | 8         | 28       | 29%         | 40%            | 17 344       | 60 704          |
| W. Cape                  | 527 649    | 530 285    | 626 350    | 680 500    | 657 147    | 734 588    | 735 000    | 259       | 598      | 43%         | 60%            | 440 753      | 1 175 341       |
| Zimbabwe                 |            |            |            |            |            |            | 64 000     | 64        | 76       | 85%         | 200%           | 128 000      | 192 000         |
| Grand Total              | 10 504 190 | 10 602 620 | 13 206 045 | 15 030 560 | 15 035 870 | 19 002 157 | 20 551 000 | 4 997     | 11 763   | 42%         | 74%            | 11 914 419   | 31 087 207      |
| Northern Region          | 2 820 212  | 3 456 157  | 4 382 096  | 4 505 160  | 5 040 460  | 7 276 854  | 8 455 000  | 2 127     | 4 972    | 43%         | 75%            | 4 713 974    | 12 161 459      |
| E Cape Region            | 6 331 651  | 5 693 758  | 7 124 584  | 8 655 609  | 8 104 805  | 9 611 219  | 9 845 000  | 2 259     | 5 338    | 42%         | 73%            | 5 727 303    | 15 338 522      |
| W & N Cape Region        | 1 352 327  | 1 452 705  | 1 699 365  | 1 869 791  | 1 890 605  | 2 114 084  | 2 251 000  | 611       | 1 453    | 42%         | 73%            | 1 473 143    | 3 587 227       |

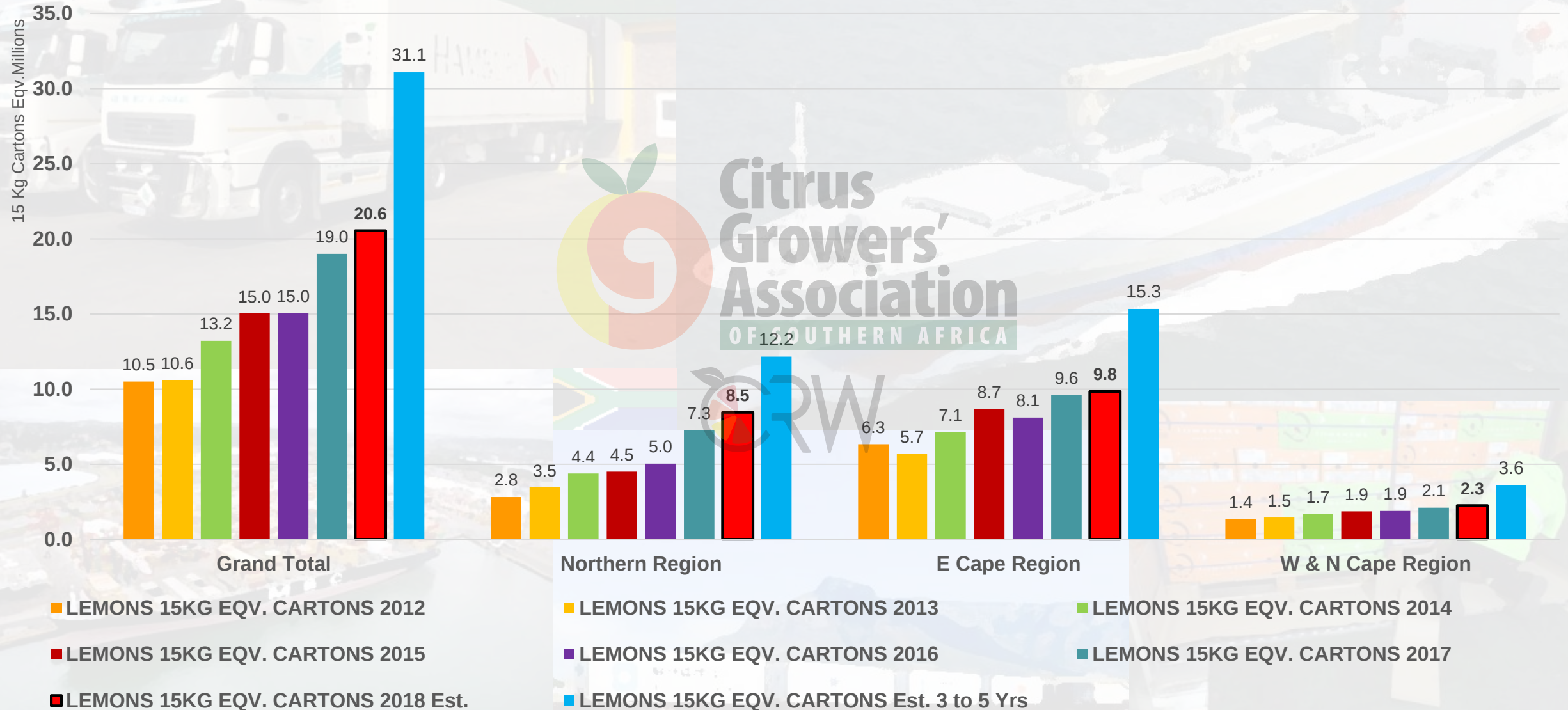
# 2018 Citrus Export Production Estimates

## Lemons Export Production by Region



# 2018 Citrus Export Production Estimates

## Lemons Export Production by Corridor





# 2018 Citrus Export Production Estimates

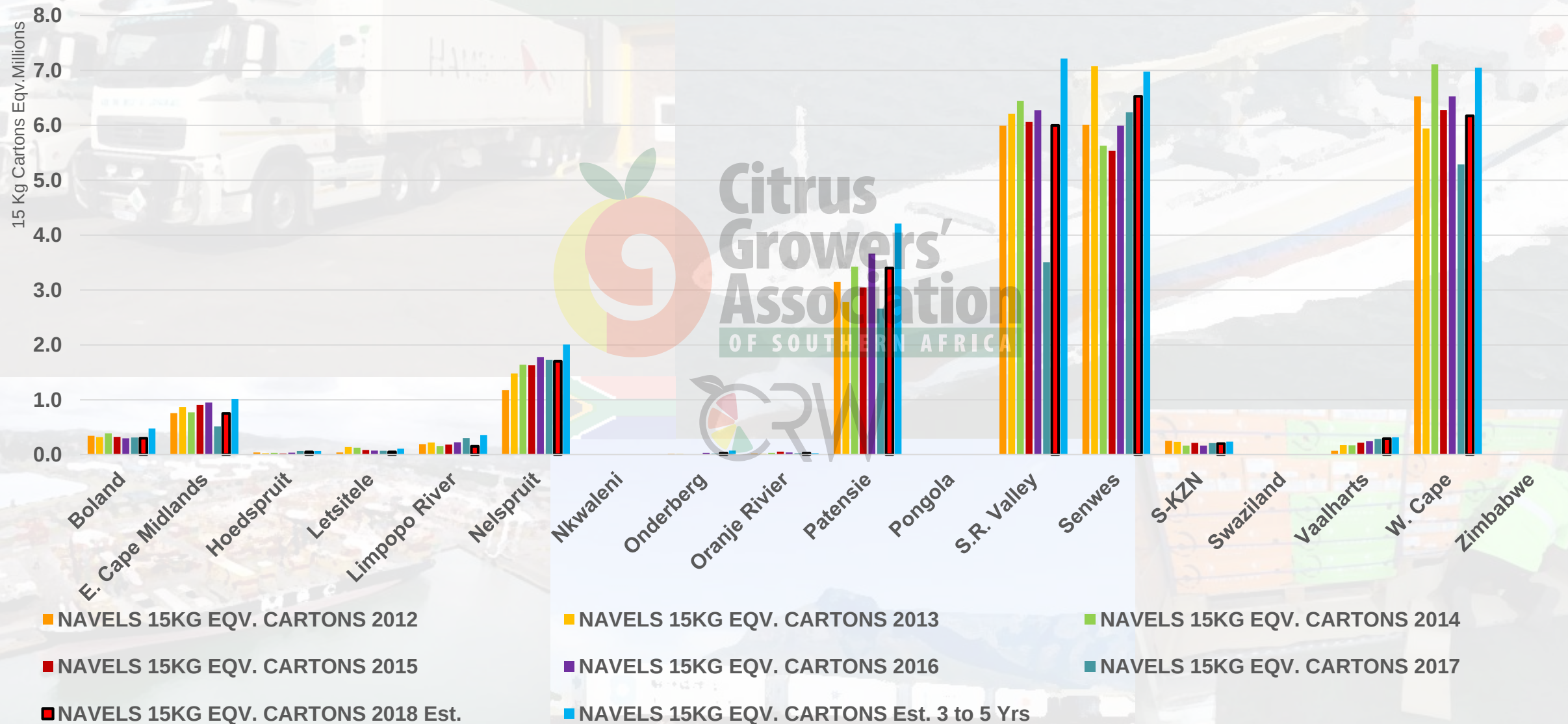
## NAVELS 15KG EQV. CARTONS

| Cga Region         | 2012              | 2013              | 2014              | 2015              | 2016              | 2017              | 2018 Est.         | Ha <4 Yrs    | Ha Total      | % Ha <4 Yrs | % Vol Increase | Vol Increase     | Est. 3 to 5 Yrs   |
|--------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|--------------|---------------|-------------|----------------|------------------|-------------------|
| Unknown            |                   |                   |                   |                   |                   |                   |                   |              |               |             |                | -                | -                 |
| Boland             | 344 626           | 320 483           | 388 985           | 325 024           | 295 941           | 313 795           | 300 000           | 89           | 262           | 34%         | 52%            | 161 713          | 475 508           |
| E. Cape Midlands   | 757 404           | 869 923           | 772 639           | 909 311           | 949 460           | 513 389           | 750 000           | 41           | 663           | 6%          | 7%             | 62 455           | 1 011 915         |
| Hoedspruit         | 38 105            | 23 006            | 30 255            | 19 312            | 36 868            | 67 897            | 50 000            |              | 39            | 0%          |                |                  | 67 897            |
| Letsitele          | 39 143            | 139 575           | 127 315           | 86 851            | 75 110            | 68 763            | 50 000            | 12           | 60            | 20%         | 25%            | 21 871           | 108 722           |
| Limpopo River      | 190 446           | 221 207           | 155 977           | 185 181           | 225 082           | 301 803           | 150 000           | 19           | 121           | 16%         | 19%            | 57 486           | 359 289           |
| Nelspruit          | 1 177 678         | 1 479 854         | 1 637 277         | 1 629 344         | 1 778 217         | 1 724 291         | 1 700 000         | 140          | 1 226         | 11%         | 13%            | 229 144          | 2 007 361         |
| Nkweleni           |                   | 39                |                   | 61                | 132               |                   |                   |              |               |             |                |                  |                   |
| Onderberg          | 16 677            | 13 409            | 1 912             | 1 768             | 31 033            | 21 353            | 25 000            | 4            | 7             | 57%         | 133%           | 41 377           | 72 410            |
| Oranje Rivier      | 20 800            | 18 684            | 32 530            | 53 440            | 40 029            | 24 770            | 25 000            |              | 12            |             |                |                  | 25 000            |
| Patensie           | 3 147 648         | 2 781 201         | 3 423 843         | 3 044 624         | 3 661 597         | 2 663 940         | 3 400 000         | 281          | 1 802         | 16%         | 15%            | 549 240          | 4 210 837         |
| Pongola            | 2 340             | 5 250             |                   |                   |                   | 400               |                   |              |               |             |                |                  |                   |
| S.R. Valley        | 5 994 717         | 6 213 951         | 6 446 212         | 6 062 258         | 6 277 194         | 3 508 341         | 6 000 000         | 699          | 4 092         | 17%         | 15%            | 941 579          | 7 218 773         |
| Senwes             | 6 013 987         | 7 078 395         | 5 627 869         | 5 539 406         | 5 994 163         | 6 240 462         | 6 530 000         | 393          | 3 723         | 11%         | 12%            | 736 487          | 6 976 949         |
| S-KZN              | 250 082           | 233 634           | 163 739           | 215 387           | 165 004           | 211 479           | 200 000           | 31           | 200           | 15%         | 10%            | 21 539           | 236 926           |
| Swaziland          |                   |                   |                   |                   |                   |                   |                   |              |               |             |                |                  |                   |
| Vaalharts          | 68 790            | 172 338           | 170 212           | 219 616           | 245 950           | 286 190           | 290 000           | 25           | 199           | 13%         | 10%            | 28 619           | 314 809           |
| W. Cape            | 6 526 074         | 5 945 572         | 7 111 547         | 6 282 886         | 6 528 923         | 5 288 113         | 6 175 000         | 375          | 3 831         | 10%         | 8%             | 522 314          | 7 051 237         |
| Zimbabwe           |                   |                   |                   |                   |                   |                   |                   |              | 174           |             |                |                  |                   |
| <b>Grand Total</b> | <b>24 588 517</b> | <b>25 516 521</b> | <b>26 090 312</b> | <b>24 574 469</b> | <b>26 304 703</b> | <b>21 234 986</b> | <b>25 645 000</b> | <b>2 109</b> | <b>16 411</b> | <b>13%</b>  | <b>15%</b>     | <b>3 373 824</b> | <b>30 137 633</b> |
| Northern Region    | 7 728 458         | 9 194 369         | 7 744 344         | 7 677 310         | 8 305 609         | 8 636 448         | 8 705 000         | 599          | 5 551         | 11%         | 12%            | 1 107 904        | 9 829 554         |
| E Cape Region      | 9 968 559         | 10 037 413        | 10 812 906        | 10 235 809        | 11 134 201        | 6 971 860         | 10 440 000        | 1 046        | 6 756         | 15%         | 18%            | 1 581 892        | 12 756 333        |
| W & N Cape Region  | 6 891 500         | 6 284 739         | 7 533 062         | 6 661 350         | 6 864 893         | 5 626 678         | 6 500 000         | 464          | 4 105         | 11%         | 13%            | 684 027          | 7 551 745         |



# 2018 Citrus Export Production Estimates

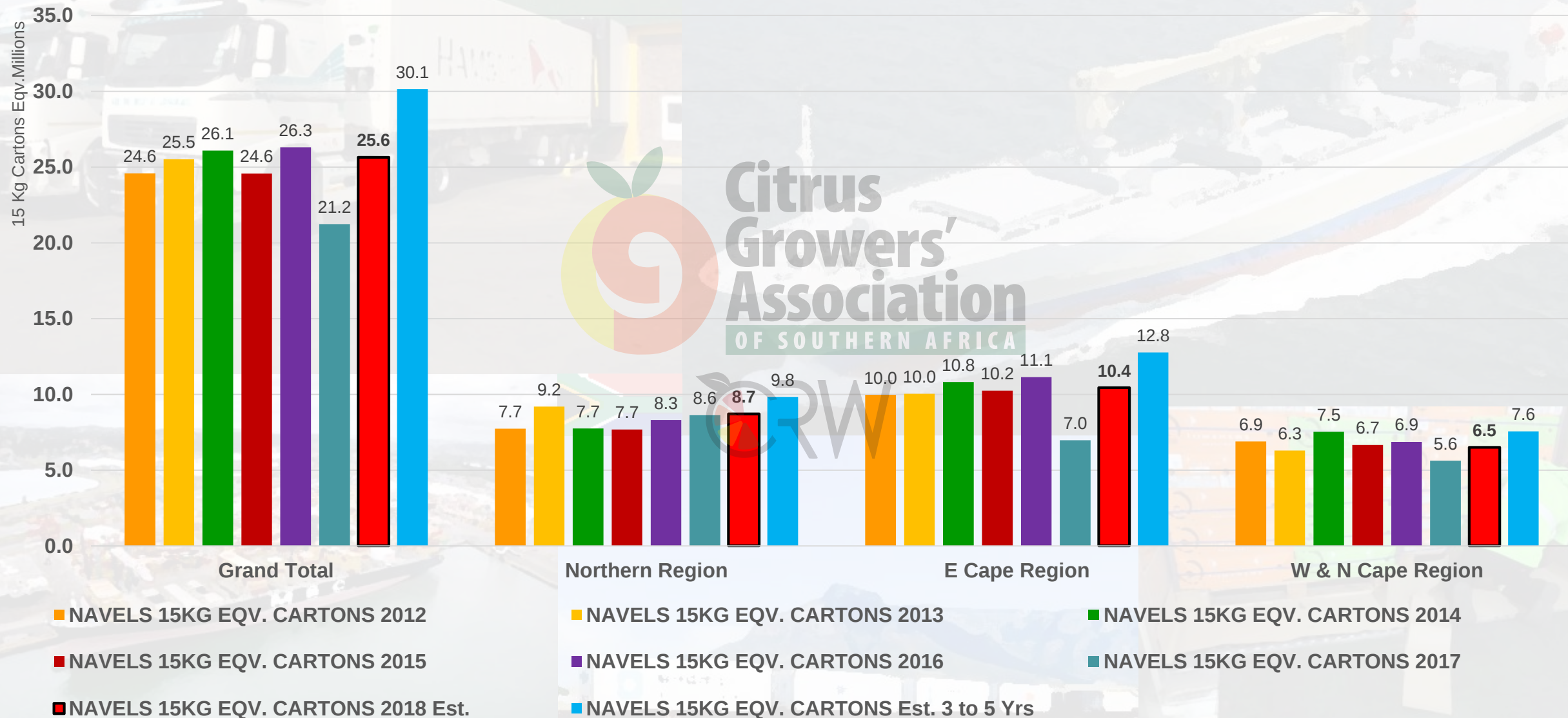
Navels Export Production by Region





# 2018 Citrus Export Production Estimates

Navels Export Production by Corridor





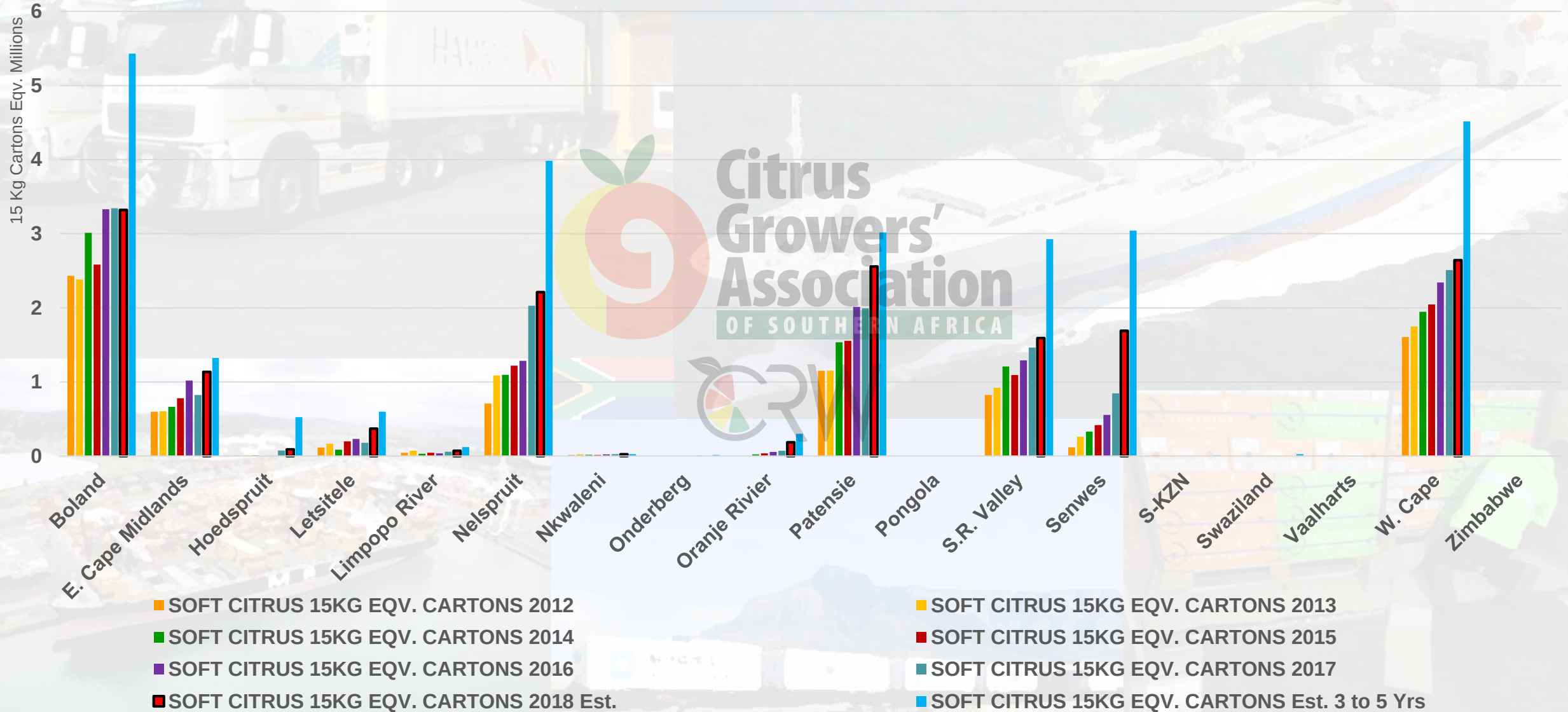
# 2018 Citrus Export Production Estimates

| SOFT CITRUS 15KG EQV. CARTONS |           |           |           |           |            |            |            |           |          |             |                |              |                 |
|-------------------------------|-----------|-----------|-----------|-----------|------------|------------|------------|-----------|----------|-------------|----------------|--------------|-----------------|
| Cga Region                    | 2012      | 2013      | 2014      | 2015      | 2016       | 2017       | 2018 Est.  | Ha <4 Yrs | Ha Total | % Ha <4 Yrs | % Vol Increase | Vol Increase | Est. 3 to 5 Yrs |
| Unknown                       |           |           |           |           |            |            | 54 000     |           |          |             |                | -            | 54 000          |
| Boland                        | 2 431 992 | 2 383 808 | 3 010 693 | 2 583 958 | 3 330 599  | 3 344 252  | 3 319 000  | 1 139     | 2 929    | 39%         | 64%            | 2 111 806    | 5 430 806       |
| E. Cape Midlands              | 600 185   | 605 447   | 664 551   | 779 755   | 1 019 052  | 822 544    | 1 135 000  | 205       | 967      | 21%         | 27%            | 305 104      | 1 324 155.8     |
| Hoedspruit                    | 6 945     | 8 093     | 7 631     | 197       | 4 020      | 75 328     | 90 000     | 218       | 233      | 93%         | 500%           | 450 000      | 525 328         |
| Letsitele                     | 114 677   | 164 299   | 85 845    | 199 283   | 230 686    | 178 565    | 369 490    | 137       | 248      | 55%         | 100%           | 369 490      | 600 176         |
| Limpopo River                 | 44 044    | 70 530    | 30 014    | 43 939    | 36 290     | 56 751     | 70 000     | 49        | 103      | 48%         | 91%            | 64 004       | 120 755         |
| Nelspruit                     | 708 632   | 1 088 401 | 1 096 267 | 1 218 385 | 1 283 718  | 2 028 709  | 2 212 463  | 983       | 1 952    | 50%         | 80%            | 1 769 970    | 3 982 433       |
| Nkweleni                      | 14 991    | 22 593    | 16 230    | 14 834    | 21 873     | 24 463     | 25 000     |           | 30       | 0%          |                |              | 25 000          |
| Onderberg                     | 1 956     | 495       | 79        |           | 382        | 6 491      |            | 7         | 7        | 100%        |                |              | 15 000          |
| Oranje Rivier                 |           | 4 802     | 22 845    | 36 290    | 55 021     | 72 664     | 185 860    | 140       | 277      | 51%         | 80%            | 58 131       | 300 000         |
| Patensie                      | 1 150 103 | 1 153 201 | 1 535 844 | 1 552 767 | 2 011 086  | 1 992 277  | 2 556 534  | 657       | 1 754    | 37%         | 50%            | 1 005 543    | 3 016 629       |
| Pongola                       |           |           |           |           |            |            |            |           |          |             |                |              |                 |
| S.R. Valley                   | 824 291   | 918 901   | 1 209 224 | 1 093 449 | 1 291 299  | 1 462 925  | 1 590 000  | 998       | 1 754    | 57%         | 100%           | 1 462 925    | 2 925 850       |
| Senwes                        | 118 072   | 261 217   | 331 133   | 416 873   | 555 263    | 846 923    | 1 689 164  | 711       | 1 413    | 50%         | 80%            | 1 351 331    | 3 040 495       |
| S-KZN                         | 12 770    | 4 345     | 23        | 74        |            | 4          |            | 8         | 8        | 100%        |                |              | 10 000          |
| Swaziland                     |           |           |           | 300       |            | 115        |            |           |          |             |                |              | 25 000          |
| Vaalharts                     | 1 329     | 1 025     | 266       |           | 2 428      |            |            |           | 15       | 0%          |                |              |                 |
| W. Cape                       | 1 605 326 | 1 750 233 | 1 945 909 | 2 044 950 | 2 342 878  | 2 509 179  | 2 641 700  | 1 530     | 3 083    | 50%         | 80%            | 2 007 343    | 4 516 522       |
| Zimbabwe                      |           |           |           |           |            |            |            |           | 30       | 0%          |                |              |                 |
| Grand Total                   | 7 635 313 | 8 437 390 | 9 956 554 | 9 985 054 | 12 184 595 | 13 421 190 | 15 938 211 | 6 782     | 14 804   | 46%         | 85%            | 10 955 648   | 25 912 150      |
| Northern Region               | 1 022 087 | 1 619 973 | 1 567 222 | 1 893 885 | 2 132 232  | 3 217 349  | 4 456 117  | 2 113     | 4 025    | 53%         | 111%           | 4 004 795    | 8 344 187       |
| E Cape Region                 | 2 575 908 | 2 678 574 | 3 409 885 | 3 425 971 | 4 323 865  | 4 277 746  | 5 281 534  | 1 860     | 4 490    | 41%         | 71%            | 2 773 572    | 7 266 635       |
| W & N Cape Region             | 4 037 318 | 4 138 843 | 4 979 447 | 4 665 198 | 5 728 498  | 5 926 095  | 6 146 560  | 2 809     | 6 289    | 45%         | 81%            | 4 177 280    | 10 247 328      |



# 2018 Export Production Est. by Region

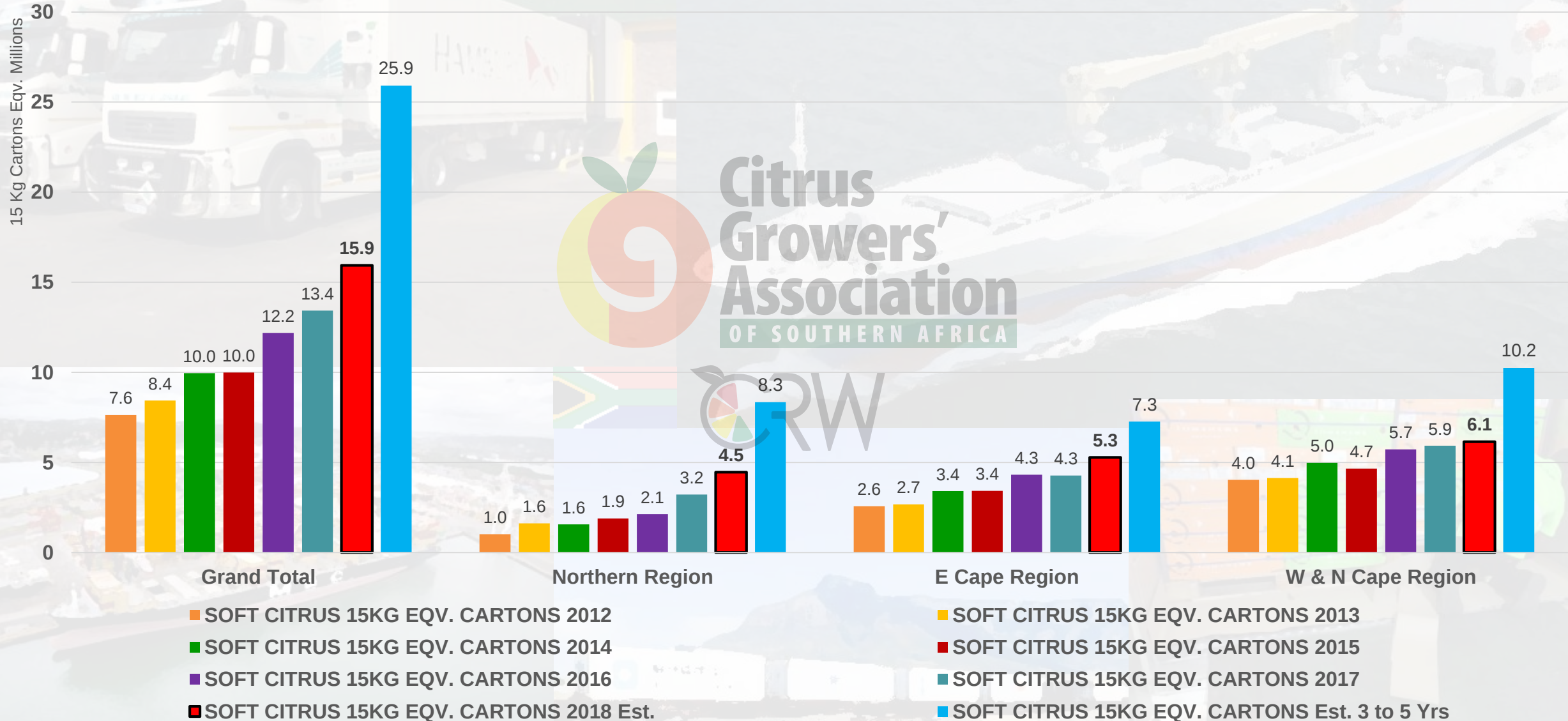
Soft Citrus Export Production by Region





# 2018 Export Production Est. by Region

Soft Citrus Export Production by Corridor





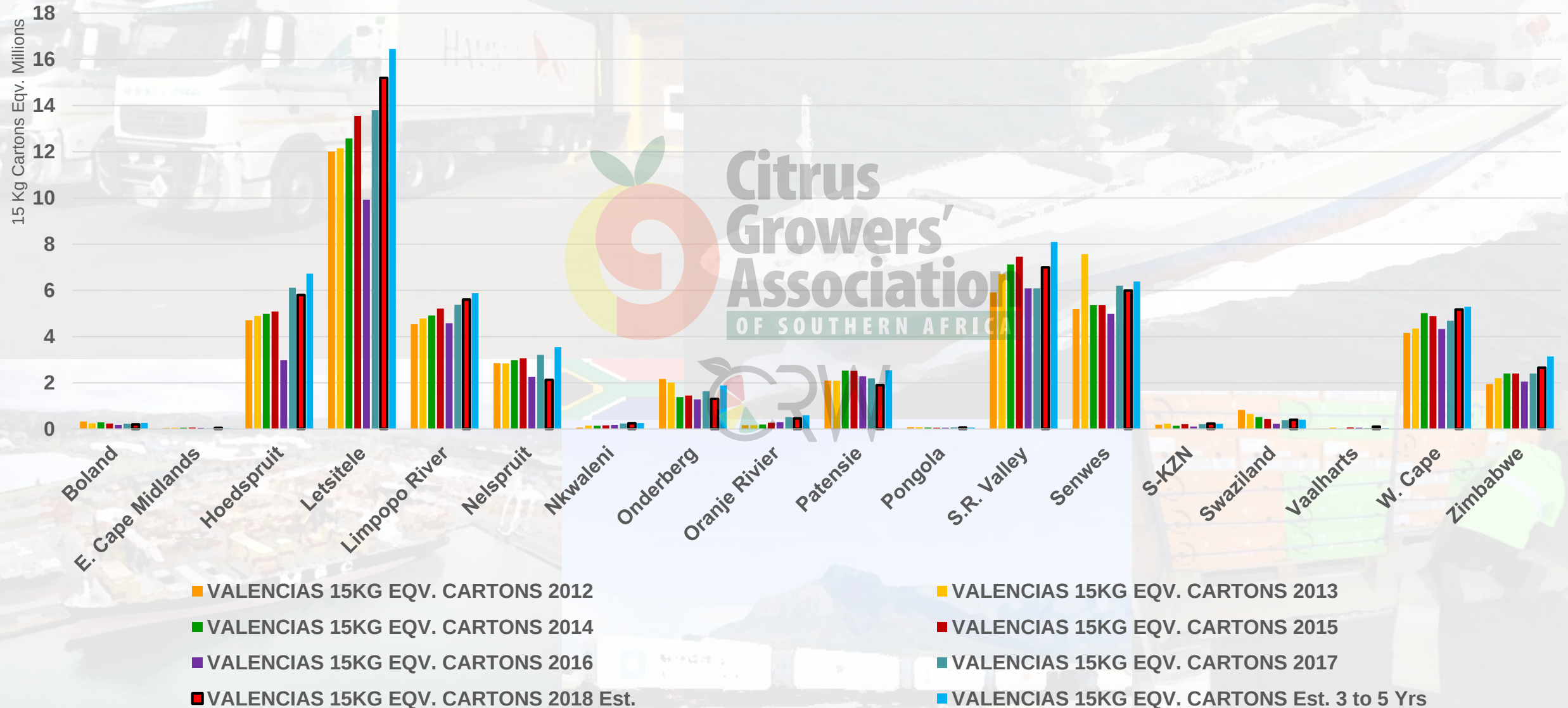
# 2018 Citrus Export Production Estimates

| VALENCIAS 15KG EQV. CARTONS |            |            |            |            |            |            |            |           |          |             |                |              |                 |
|-----------------------------|------------|------------|------------|------------|------------|------------|------------|-----------|----------|-------------|----------------|--------------|-----------------|
| Cga Region                  | 2012       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018 Est.  | Ha <4 Yrs | Ha Total | % Ha <4 Yrs | % Vol Increase | Vol Increase | Est. 3 to 5 Yrs |
| Unknown                     |            |            |            |            |            |            |            |           |          |             |                | -            | -               |
| Boland                      | 321 351    | 244 067    | 285 053    | 235 238    | 173 212    | 225 231    | 200 000    | 16        | 121      | 13%         | 15%            | 34 380       | 259 611         |
| E. Cape Midlands            | 39 883     | 49 337     | 55 689     | 60 549     | 46 955     | 23 108     | 50 000     | 3         | 24       | 10%         | 12%            | 5 410        | 28 518          |
| Hoedspruit                  | 4 708 234  | 4 898 019  | 4 982 242  | 5 091 921  | 2 985 772  | 6 114 681  | 5 800 000  | 397       | 2 691    | 15%         | 10%            | 611 468      | 6 726 149       |
| Letsitele                   | 12 011 282 | 12 149 454 | 12 578 709 | 13 551 648 | 9 919 637  | 13 798 477 | 15 200 000 | 1 305     | 8 084    | 16%         | 19%            | 2 656 423    | 16 454 900      |
| Limpopo River               | 4 534 985  | 4 784 235  | 4 915 521  | 5 212 267  | 4 581 474  | 5 377 653  | 5 600 000  | 241       | 2 832    | 9%          | 9%             | 501 378      | 5 879 031       |
| Nelspruit                   | 2 846 769  | 2 845 089  | 2 979 125  | 3 059 082  | 2 260 497  | 3 209 273  | 2 131 000  | 125       | 1 321    | 9%          | 10%            | 335 477      | 3 544 750       |
| Nkweleni                    | 61 142     | 148 367    | 144 358    | 161 888    | 172 070    | 235 256    | 250 000    |           | 196      | 0%          |                |              | 250 000         |
| Onderberg                   | 2 167 101  | 2 010 629  | 1 374 068  | 1 444 549  | 1 277 965  | 1 642 175  | 1 300 000  | 239       | 1 096    | 22%         | 15%            | 246 326      | 1 888 501       |
| Oranje Rivier               | 164 435    | 168 000    | 194 455    | 267 590    | 301 188    | 512 260    | 460 000    | 33        | 246      | 14%         | 16%            | 80 340       | 592 600         |
| Patensie                    | 2 092 672  | 2 083 300  | 2 526 003  | 2 517 689  | 2 276 946  | 2 196 065  | 1 900 000  | 109       | 1 028    | 11%         | 12%            | 269 079      | 2 546 025       |
| Pongola                     | 76 298     | 77 409     | 64 832     | 52 329     | 55 487     | 67 234     | 60 000     |           | 41       | 0%          |                |              | 60 000          |
| S.R. Valley                 | 5 913 782  | 6 714 804  | 7 123 762  | 7 454 897  | 6 086 920  | 6 086 529  | 7 000 000  | 247       | 3 118    | 8%          | 9%             | 640 258      | 8 095 155       |
| Senwes                      | 5 190 322  | 7 571 264  | 5 359 953  | 5 362 073  | 4 982 353  | 6 197 814  | 6 000 000  | 92        | 3 079    | 3%          | 3%             | 191 398      | 6 389 212       |
| S-KZN                       | 180 793    | 230 935    | 136 355    | 208 274    | 104 515    | 208 061    | 230 000    | 7         | 113      | 6%          | 7%             | 13 748       | 230 000         |
| Swaziland                   | 822 000    | 646 000    | 518 000    | 425 360    | 231 000    | 387 000    | 396 000    |           | 160      | 0%          |                |              | 400 000         |
| Vaalharts                   | 17 053     | 60 007     | 17 278     | 69 538     | 53 200     | 38 790     | 100 000    |           | 41       | 0%          |                |              | 38 790          |
| W. Cape                     | 4 157 772  | 4 350 465  | 5 015 930  | 4 888 015  | 4 328 269  | 4 686 641  | 5 173 907  | 263       | 2 323    | 11%         | 13%            | 599 249      | 5 285 890       |
| Zimbabwe                    | 1 950 000  | 2 200 000  | 2 400 000  | 2 400 000  | 2 050 000  | 2 400 000  | 2 650 000  | 265       | 1 566    | 17%         | 20%            | 488 878      | 3 138 878       |
| Grand Total                 | 47 255 874 | 51 231 381 | 50 671 333 | 52 462 907 | 41 887 460 | 53 406 248 | 54 500 907 | 3 342     | 28 081   | 12%         | 14%            | 6 673 811    | 61 808 009      |
| Northern Region             | 34 548 926 | 37 561 401 | 35 453 163 | 36 969 391 | 28 620 770 | 39 637 624 | 39 617 000 | 2 671     | 21 179   | 13%         | 14%            | 5 045 096    | 44 961 421      |
| E Cape Region               | 8 063 390  | 8 907 448  | 9 722 732  | 10 102 673 | 8 464 021  | 8 344 492  | 9 050 000  | 358       | 4 212    | 8%          | 9%             | 914 747      | 10 708 488      |
| W & N Cape Region           | 4 643 558  | 4 762 532  | 5 495 438  | 5 390 843  | 4 802 669  | 5 424 132  | 5 833 907  | 313       | 2 690    | 12%         | 13%            | 713 969      | 6 138 101       |



# 2018 Export Production Est. by Region

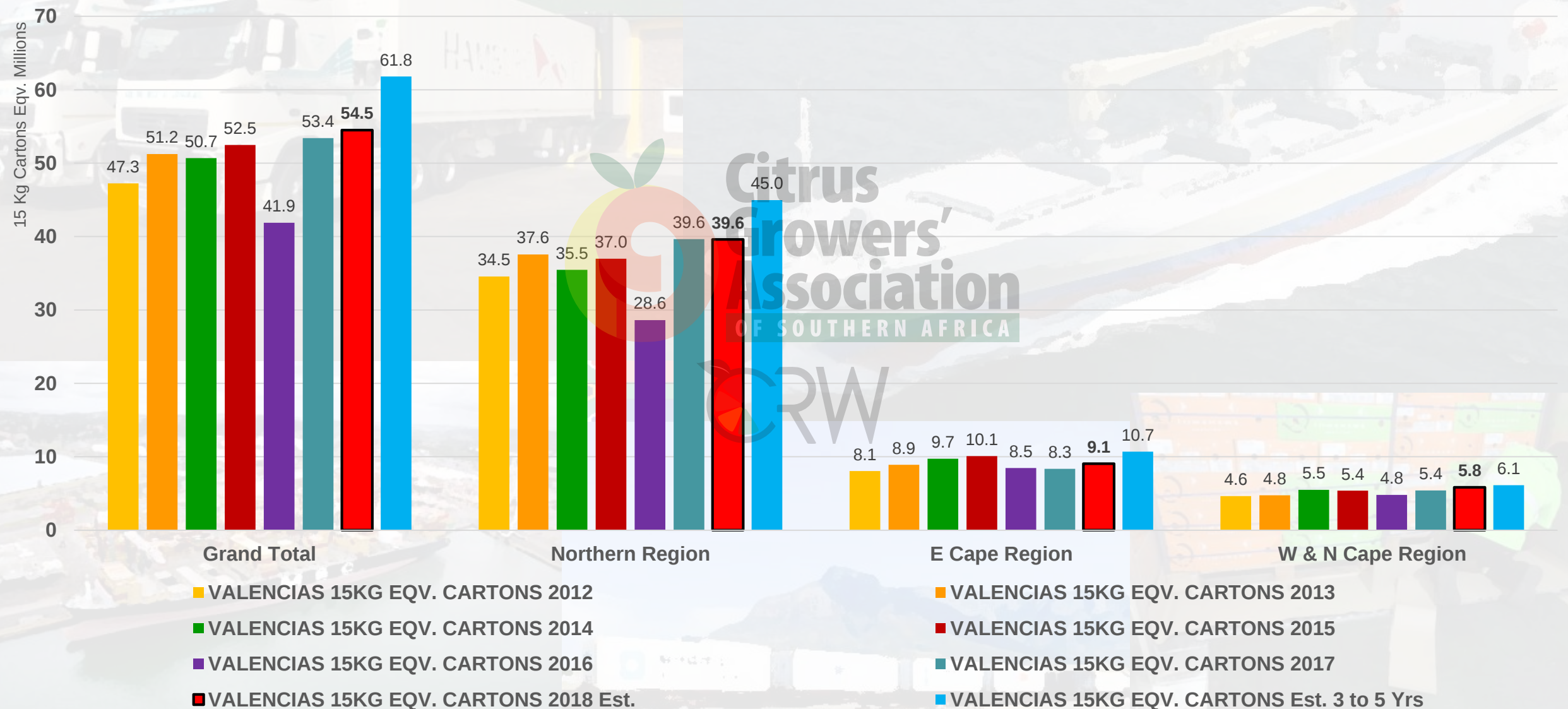
Valencias Export Production by Region





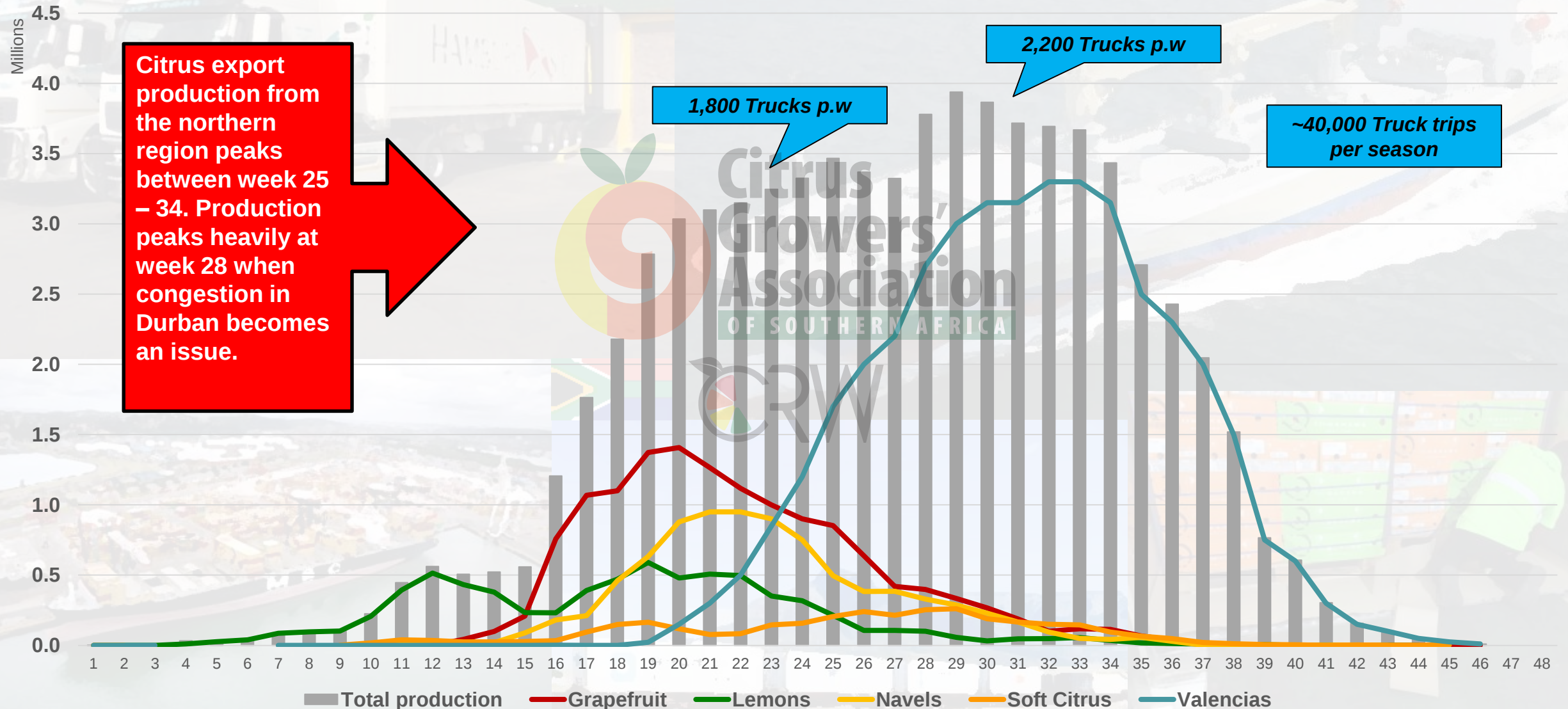
# 2018 Export Production Est. by Region

Valencias Export Production by Corridor



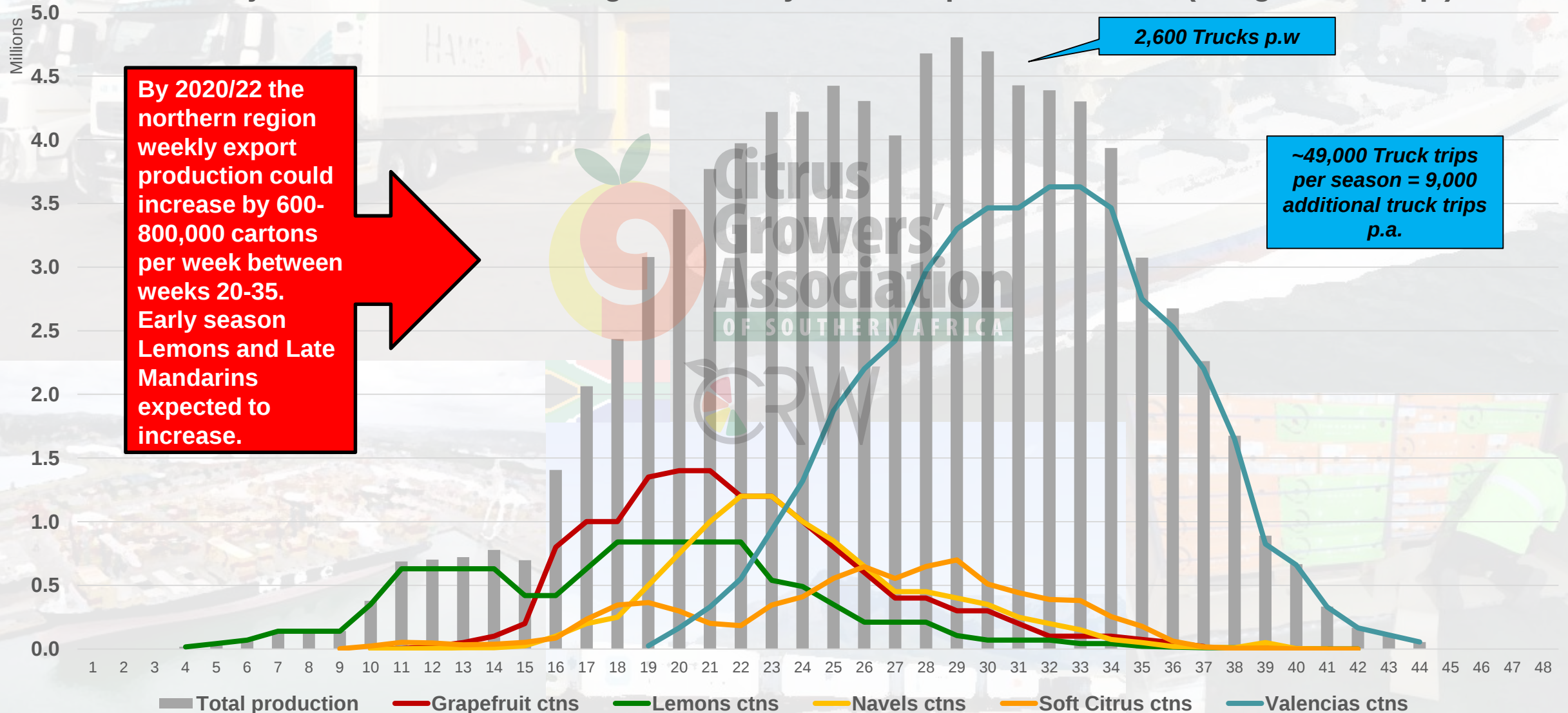
# Outlook on Citrus Export Production & Capacity

Northern Regions [2017] Weekly Citrus Export Production (15Kg Carton Eqv.)



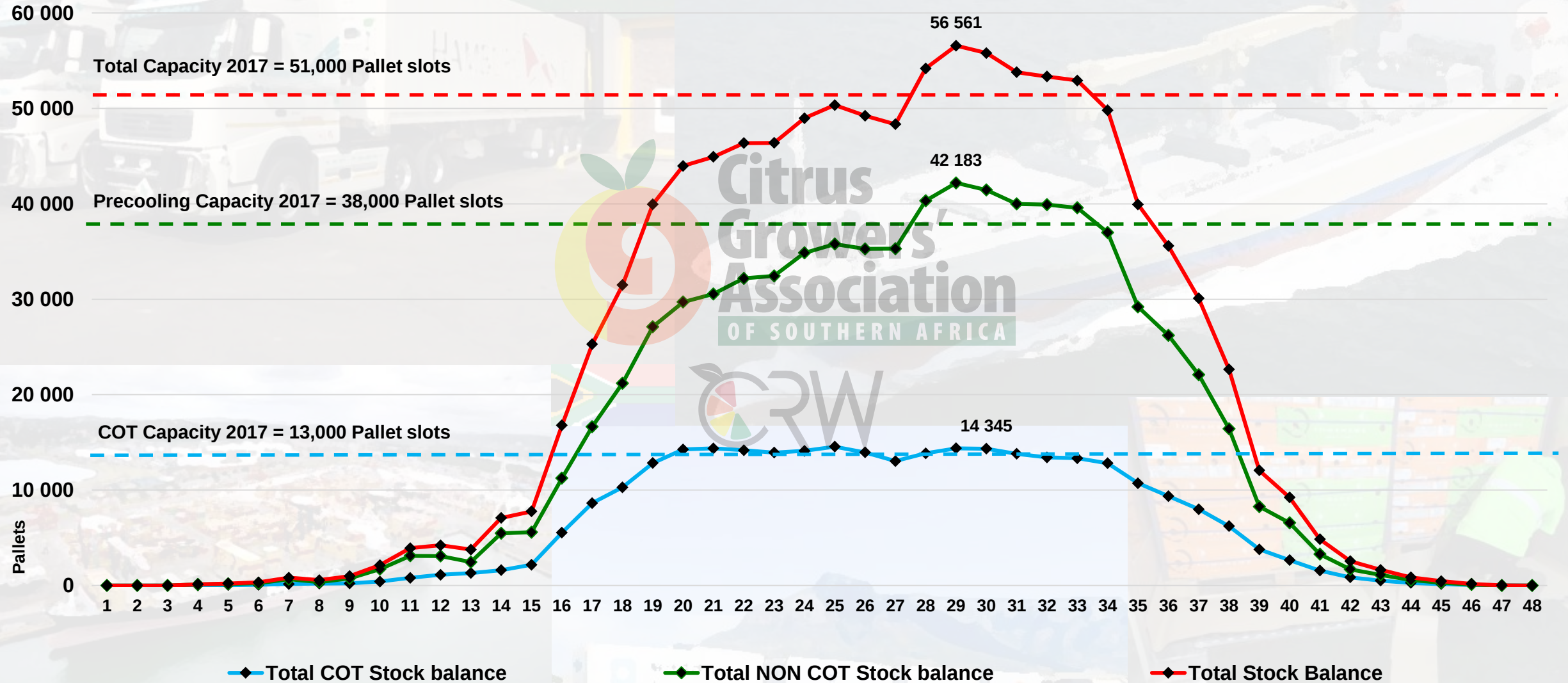
# Outlook on Citrus Export Production & Capacity

Projected 2022 Northern Regions Weekly Citrus Export Production (15Kg Carton Eqv)



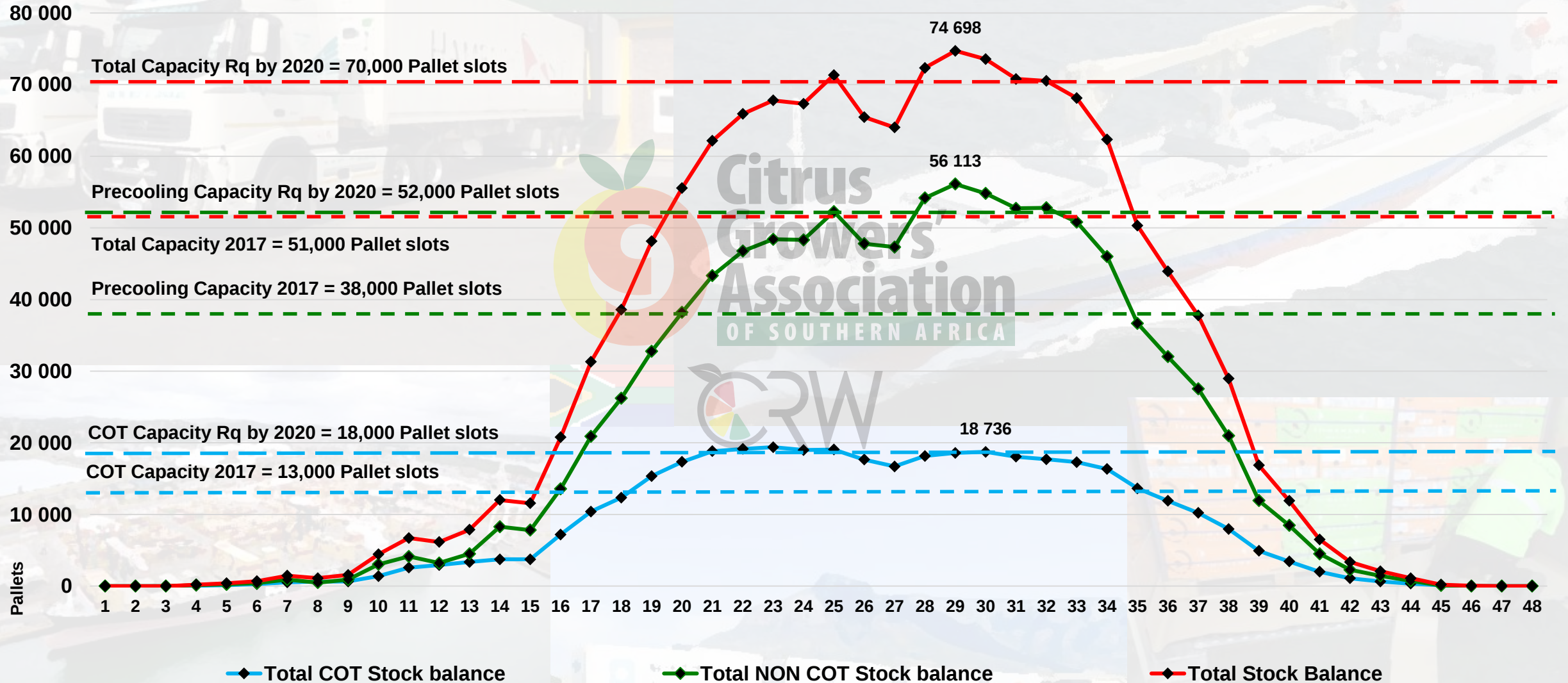
# Outlook on Citrus Export Production & Capacity

## Northern Regions Current [2017] Stock vs. Capacity Demand



# Outlook on Citrus Export Production & Capacity

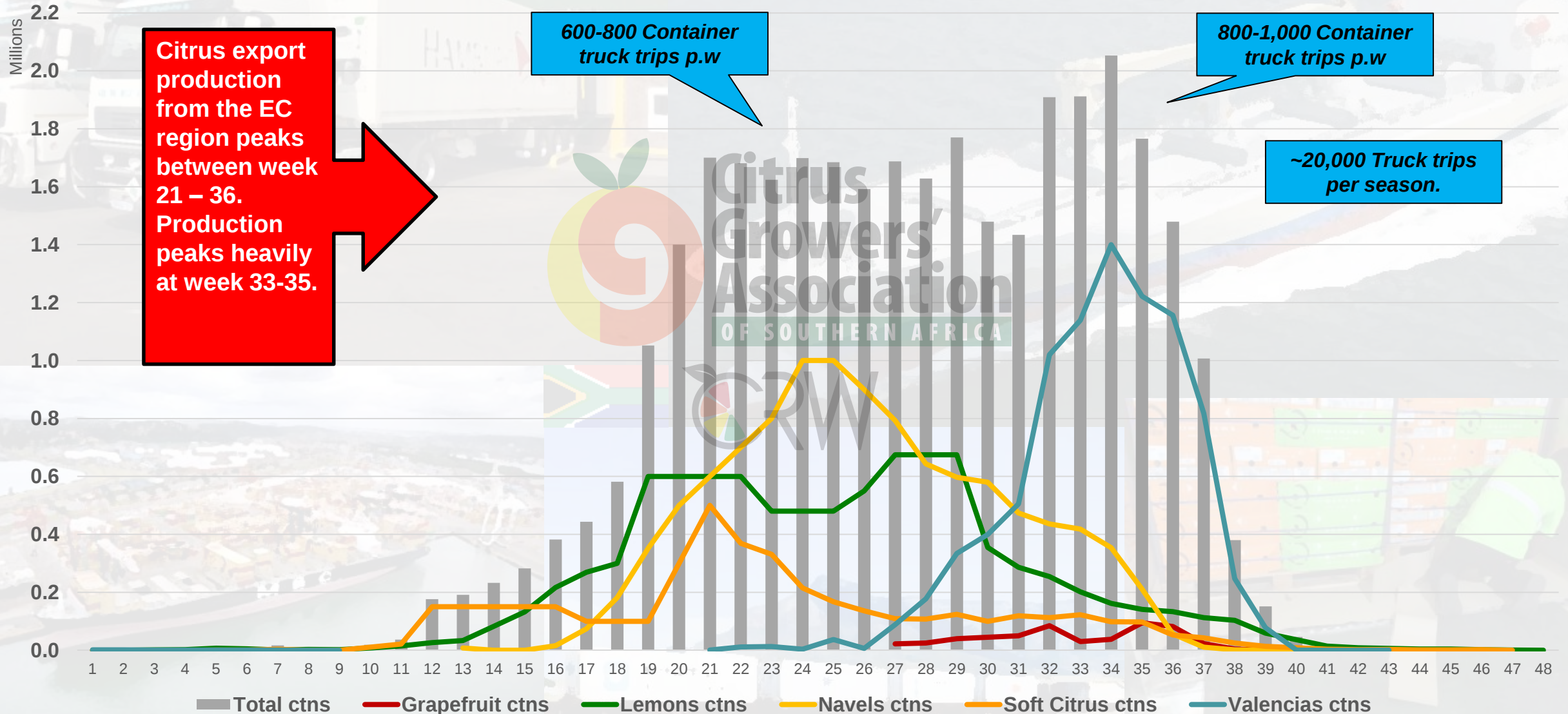
## Northern Regions 2020-22 Estimated Stock vs. Capacity Demand



**Potential increase in inland container loading must be factored in (cold stores, packhouses and rail)**

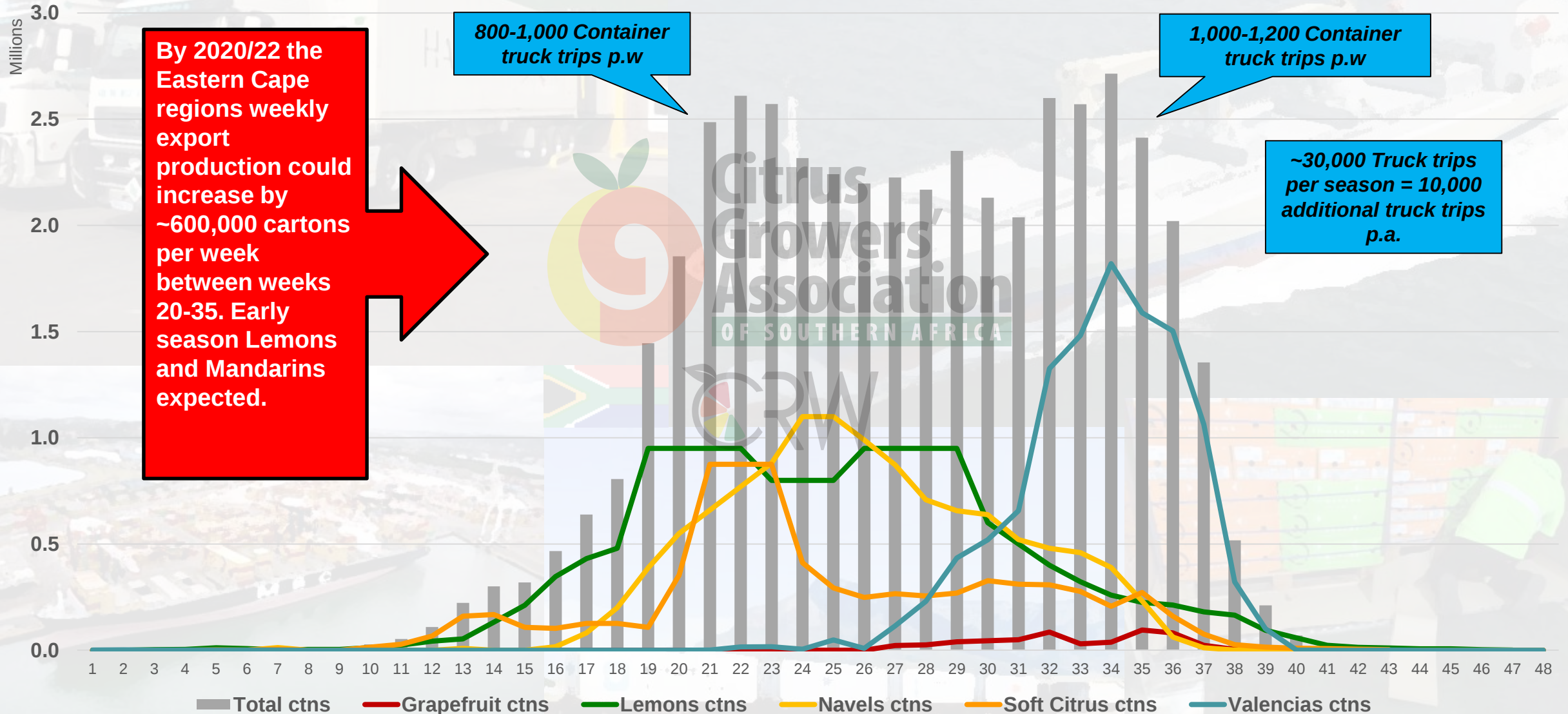
# Outlook on Citrus Export Production & Capacity

EC Regions [2016] Weekly Citrus Export Production (15Kg Cartons Eqv .)



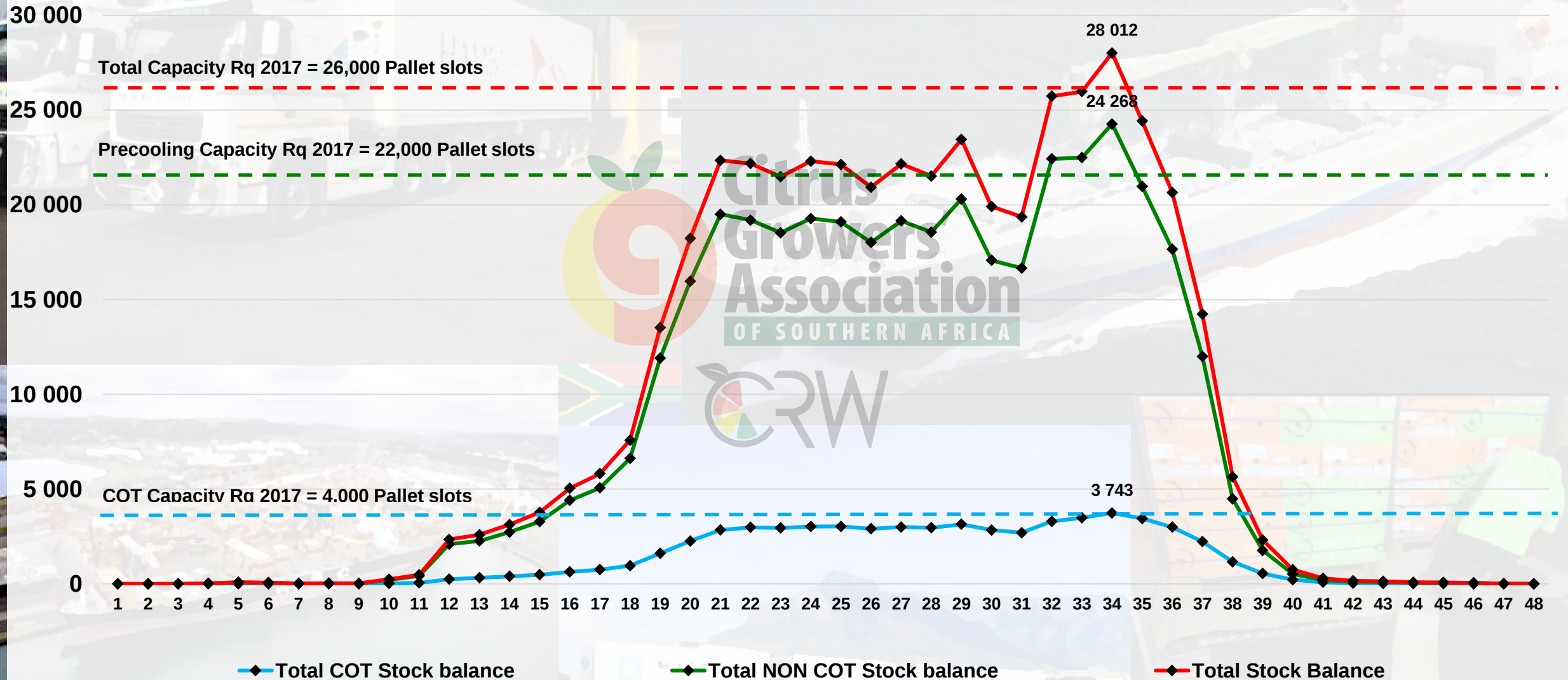
# Outlook on Citrus Export Production & Capacity

Projected 2022 EC Regions Weekly Citrus Export Production (15Kg Cartons Eqv .)



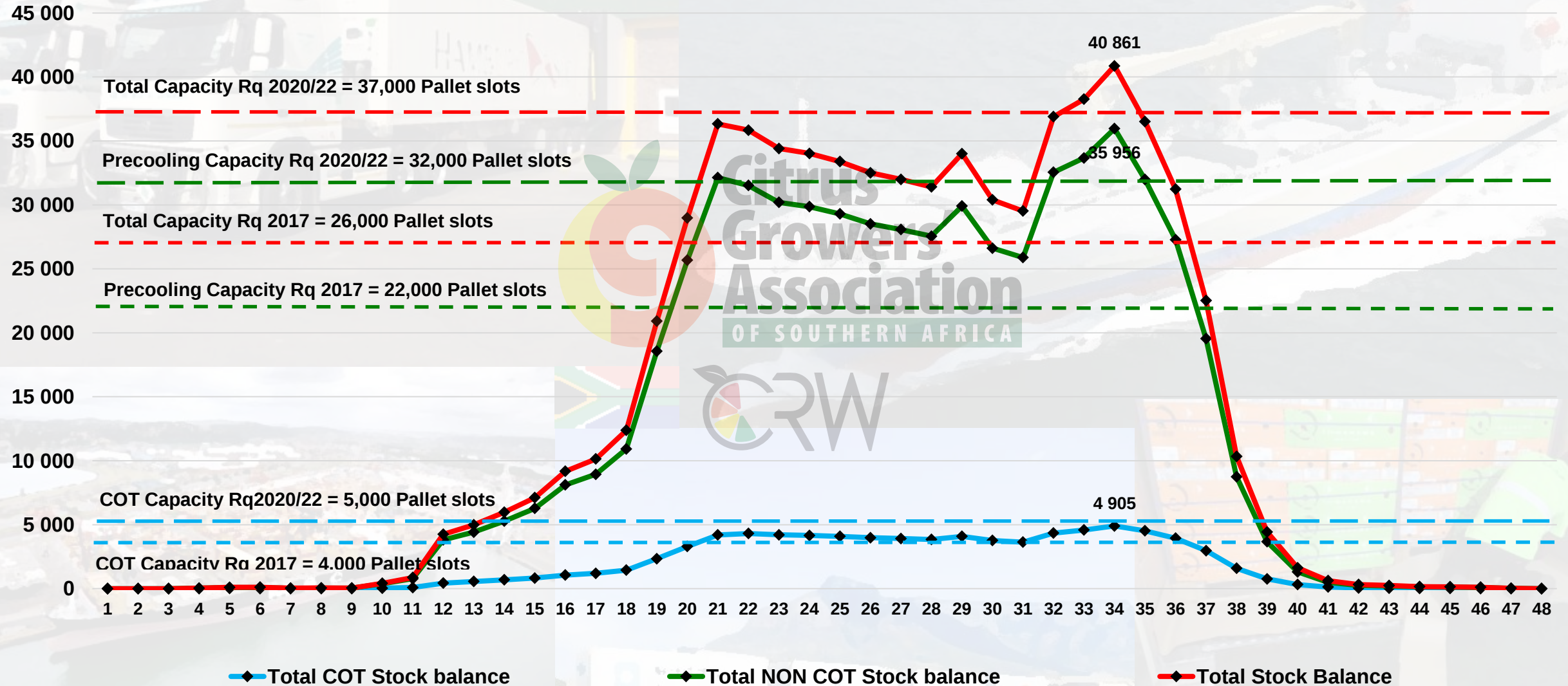
# Outlook on Citrus Export Production & Capacity

## EC Regions [2016] Stock vs. Capacity Demand



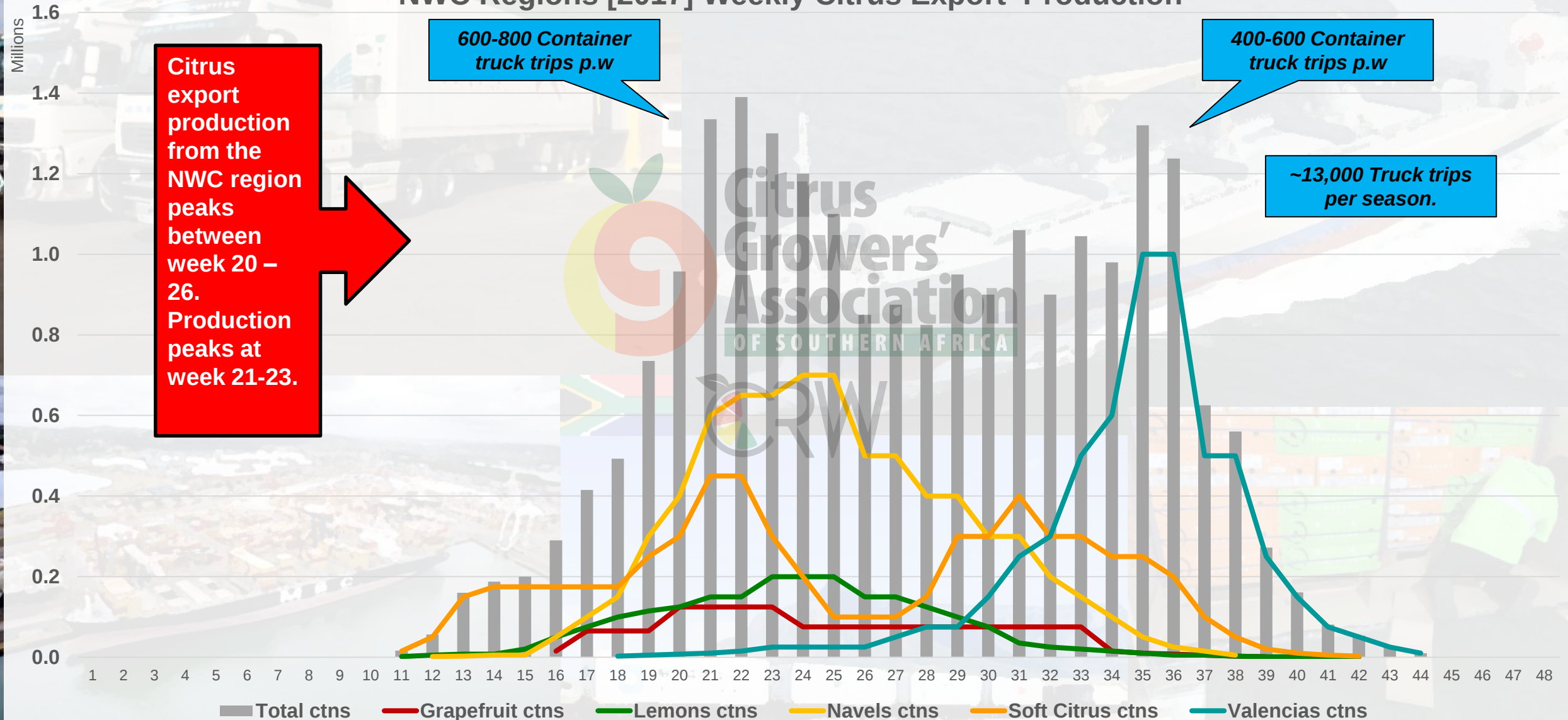
# Outlook on Citrus Export Production & Capacity

## EC Regions 2020-22 Estimated Stock vs. Capacity Demand



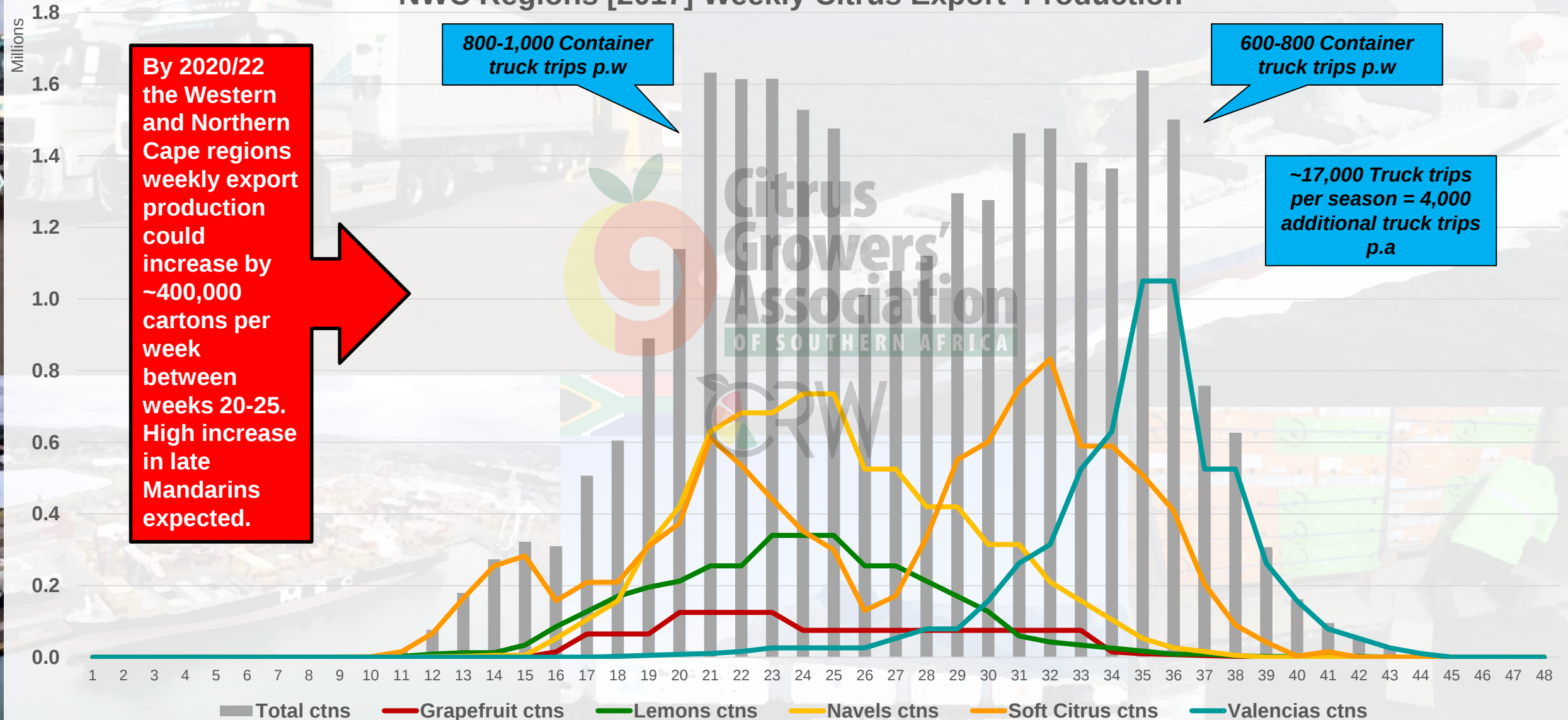
# Outlook on Citrus Export Production & Capacity

NWC Regions [2017] Weekly Citrus Export Production



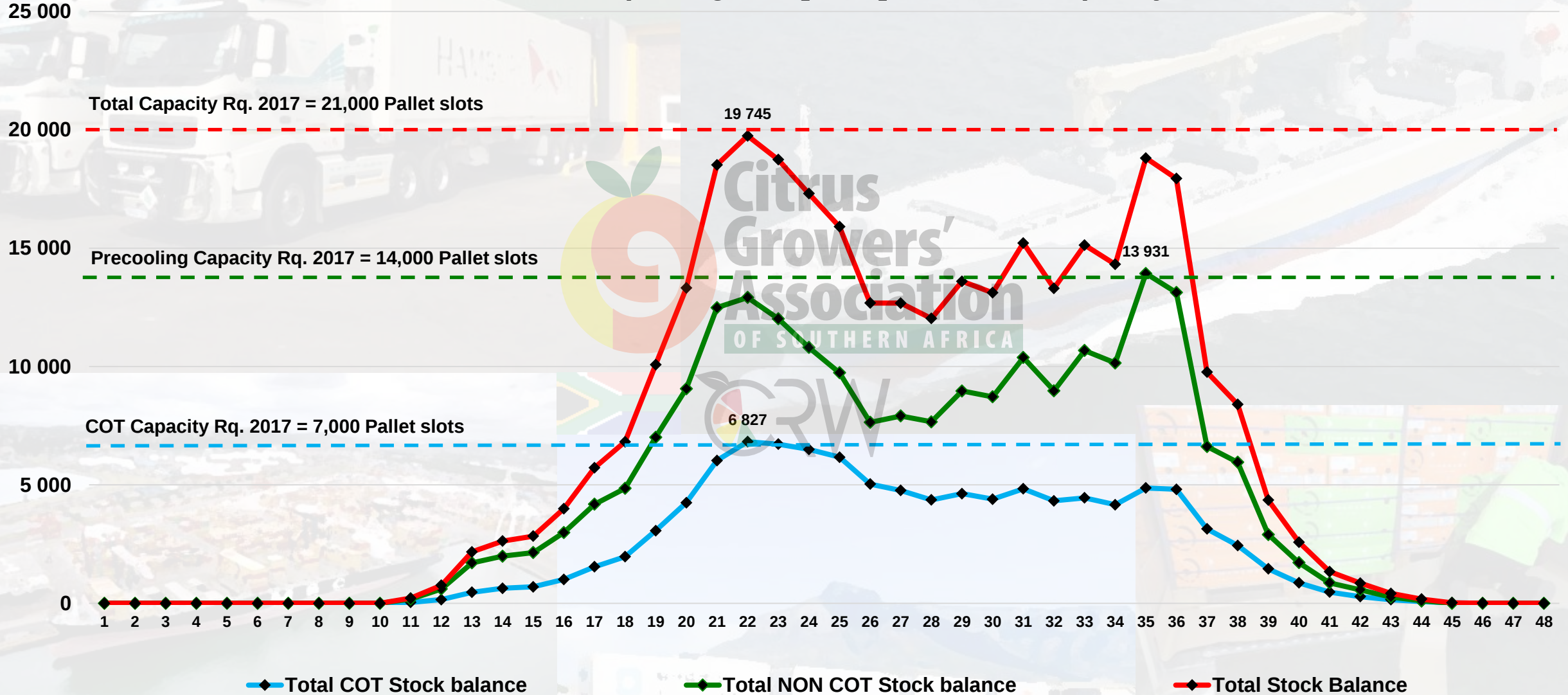
# Outlook on Citrus Export Production & Capacity

NWC Regions [2017] Weekly Citrus Export Production



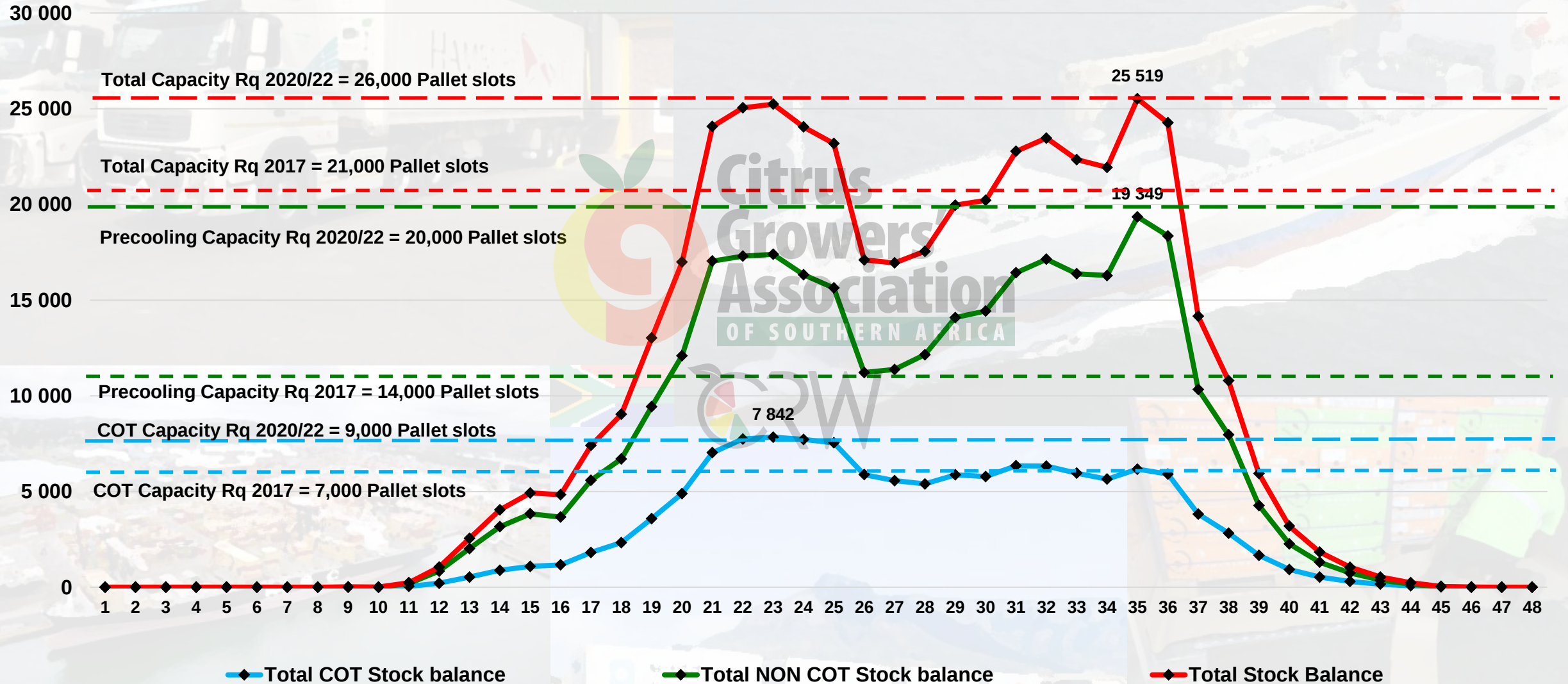
# Outlook on Citrus Export Production & Capacity

## Northern & Western Cape Regions [2017] Stock vs. Capacity Demand



# Outlook on Citrus Export Production & Capacity

## NWC Regions 2020-22 Estimated Stock vs. Capacity Demand



# Outlook on Shipping and Equipment

## Citrus Export Volume by Commodity by Load Port (Pallets)

| Exit Port                                                   | Commodity    | 2012             | 2013             | 2014             | 2015             | 2016             | 2017             | 2018 Est. 1      | Est. 3 to 5 Yrs  |
|-------------------------------------------------------------|--------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Eastern Cape to PE & Coega Ports                            | Grapefruit   | 7 258            | 6 082            | 7 145            | 4 918            | 6 455            | 4 586            | 5 000            | 7 000            |
|                                                             | Lemons       | 74 305           | 66 555           | 81 668           | 99 527           | 94 328           | 112 295          | 116 000          | 160 000          |
|                                                             | Oranges      | 218 804          | 232 643          | 248 543          | 249 738          | 244 447          | 185 169          | 250 000          | 270 000          |
|                                                             | Soft Citrus  | 26 172           | 29 331           | 39 044           | 40 302           | 52 743           | 47 820           | 55 000           | 85 000           |
|                                                             | <b>Total</b> | <b>326 539</b>   | <b>335 993</b>   | <b>377 142</b>   | <b>394 485</b>   | <b>397 973</b>   | <b>349 870</b>   | <b>426 000</b>   | <b>522 000</b>   |
| Northern Region to Durban Port (Incl. Zimbabwe & Swaziland) | Grapefruit   | 153 052          | 228 324          | 195 084          | 206 217          | 178 086          | 195 385          | 205 000          | 216 000          |
|                                                             | Lemons       | 36 042           | 43 949           | 54 775           | 55 582           | 62 409           | 92 530           | 107 500          | 140 000          |
|                                                             | Oranges      | 499 895          | 538 196          | 512 407          | 532 139          | 456 476          | 581 858          | 580 000          | 620 000          |
|                                                             | Soft Citrus  | 12 022           | 19 944           | 19 538           | 25 450           | 27 544           | 43 642           | 60 000           | 78 500           |
|                                                             | <b>Total</b> | <b>701 010</b>   | <b>832 304</b>   | <b>783 660</b>   | <b>819 388</b>   | <b>724 516</b>   | <b>913 415</b>   | <b>952 500</b>   | <b>1 054 500</b> |
| Western/Northern Cape to Cape Town Port                     | Grapefruit   | 9 527            | 9 772            | 10 520           | 10 912           | 17 496           | 21 616           | 22 000           | 22 000           |
|                                                             | Lemons       | 19 696           | 22 733           | 24 674           | 28 438           | 26 256           | 28 975           | 30 000           | 45 000           |
|                                                             | Oranges      | 148 015          | 153 839          | 176 871          | 165 529          | 153 490          | 149 523          | 175 000          | 180 000          |
|                                                             | Soft Citrus  | 72 380           | 71 685           | 79 056           | 78 446           | 91 501           | 100 520          | 105 000          | 160 000          |
|                                                             | <b>Total</b> | <b>249 619</b>   | <b>260 959</b>   | <b>295 467</b>   | <b>283 324</b>   | <b>288 743</b>   | <b>300 634</b>   | <b>332 000</b>   | <b>407 000</b>   |
| Southern Africa (Incl. Swaziland & Zimbabwe)                | Grapefruit   | 187 988          | 253 206          | 212 749          | 222 047          | 202 037          | 221 587          | 232 000          | 245 000          |
|                                                             | Lemons       | 130 379          | 133 378          | 161 318          | 183 547          | 182 993          | 233 800          | 253 500          | 345 000          |
|                                                             | Oranges      | 903 817          | 955 564          | 940 981          | 953 786          | 854 413          | 916 550          | 1 005 000        | 1 070 000        |
|                                                             | Soft Citrus  | 111 103          | 120 959          | 137 638          | 144 198          | 171 788          | 191 982          | 220 000          | 323 500          |
|                                                             | <b>Total</b> | <b>1 333 287</b> | <b>1 469 313</b> | <b>1 459 630</b> | <b>1 503 578</b> | <b>1 411 232</b> | <b>1 563 919</b> | <b>1 710 500</b> | <b>1 983 500</b> |

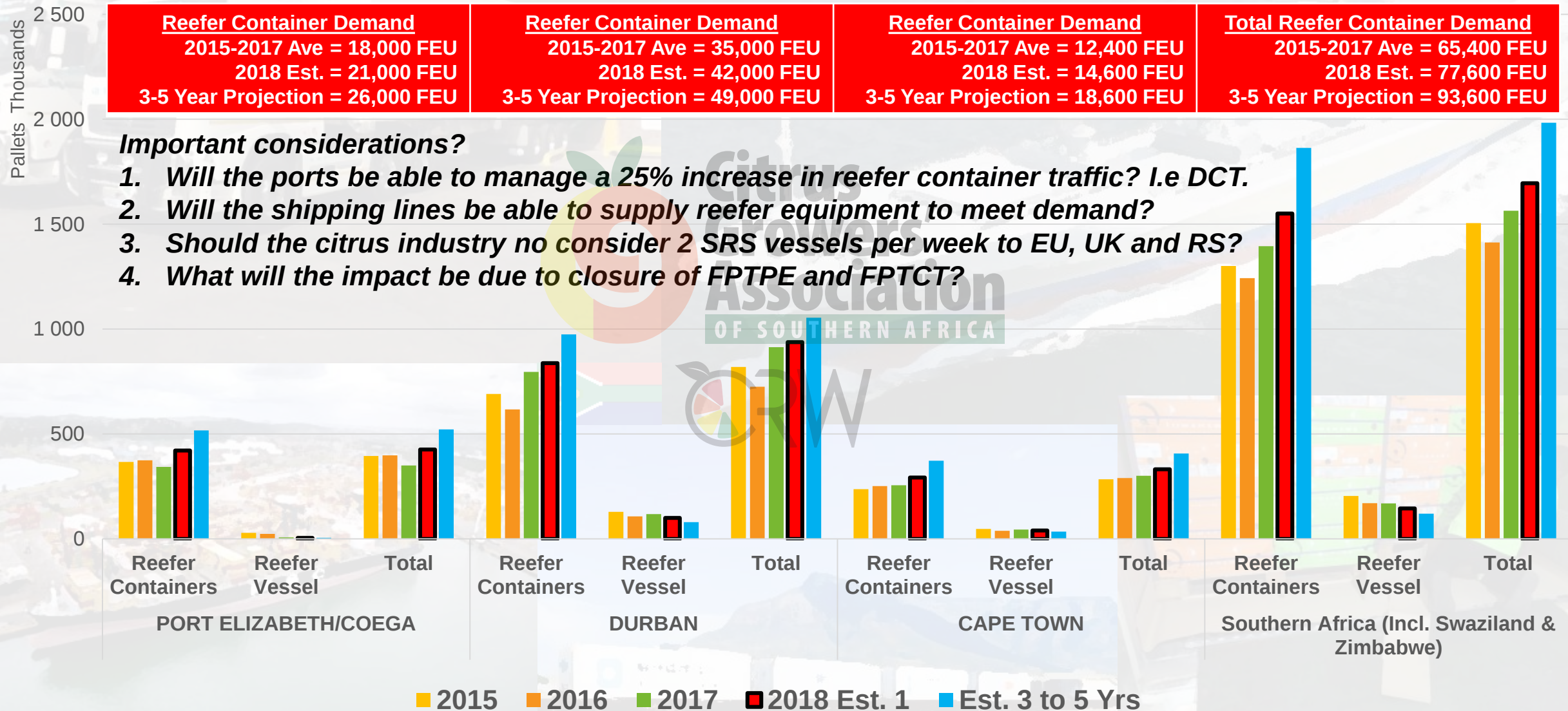
# Outlook on Shipping and Equipment

**Citrus Export Volume by Ship Mode by Load Port (Pallets)**

| Departure Port                                  | Vessel Type       | 2012      | 2013      | 2014      | 2015      | 2016      | 2017      | 2018 Est. 1 | Est. 3 to 5 Yrs |
|-------------------------------------------------|-------------------|-----------|-----------|-----------|-----------|-----------|-----------|-------------|-----------------|
| PORT ELIZABETH/COEGA                            | Reefer Containers | 296 487   | 313 348   | 350 306   | 366 623   | 374 104   | 343 260   | 421 000     | 517 000         |
|                                                 | Reefer Vessel     | 30 052    | 22 645    | 26 836    | 28 205    | 23 869    | 6 610     | 5 000       | 5 000           |
|                                                 | Total             | 326 539   | 335 993   | 377 142   | 394 828   | 397 973   | 349 870   | 426 000     | 522 000         |
| DURBAN                                          | Reefer Containers | 548 729   | 677 148   | 616 478   | 691 135   | 617 179   | 795 800   | 852 500     | 974 500         |
|                                                 | Reefer Vessel     | 152 281   | 155 156   | 167 182   | 128 574   | 107 455   | 117 615   | 100 000     | 80 000          |
|                                                 | Total             | 701 010   | 832 304   | 783 660   | 819 709   | 724 634   | 913 415   | 952 500     | 1 054 500       |
| CAPE TOWN                                       | Reefer Containers | 195 818   | 209 066   | 249 693   | 236 958   | 251 468   | 255 966   | 292 000     | 372 000         |
|                                                 | Reefer Vessel     | 53 801    | 51 893    | 45 774    | 47 529    | 38 906    | 44 667    | 40 000      | 35 000          |
|                                                 | Total             | 249 619   | 260 959   | 295 467   | 284 487   | 290 374   | 300 634   | 332 000     | 407 000         |
| Southern Africa<br>(Incl. Swaziland & Zimbabwe) | Reefer Containers | 1 048 623 | 1 209 743 | 1 219 838 | 1 301 096 | 1 242 751 | 1 395 026 | 1 565 500   | 1 863 500       |
|                                                 | Reefer Vessel     | 284 664   | 259 570   | 239 792   | 204 308   | 170 230   | 168 892   | 145 000     | 120 000         |
|                                                 | Total             | 1 333 287 | 1 469 313 | 1 459 630 | 1 505 404 | 1 412 981 | 1 563 918 | 1 710 500   | 1 983 500       |

# Outlook on Shipping and Equipment

Citrus Exports by Ship Mode by Load Port (Pallets)

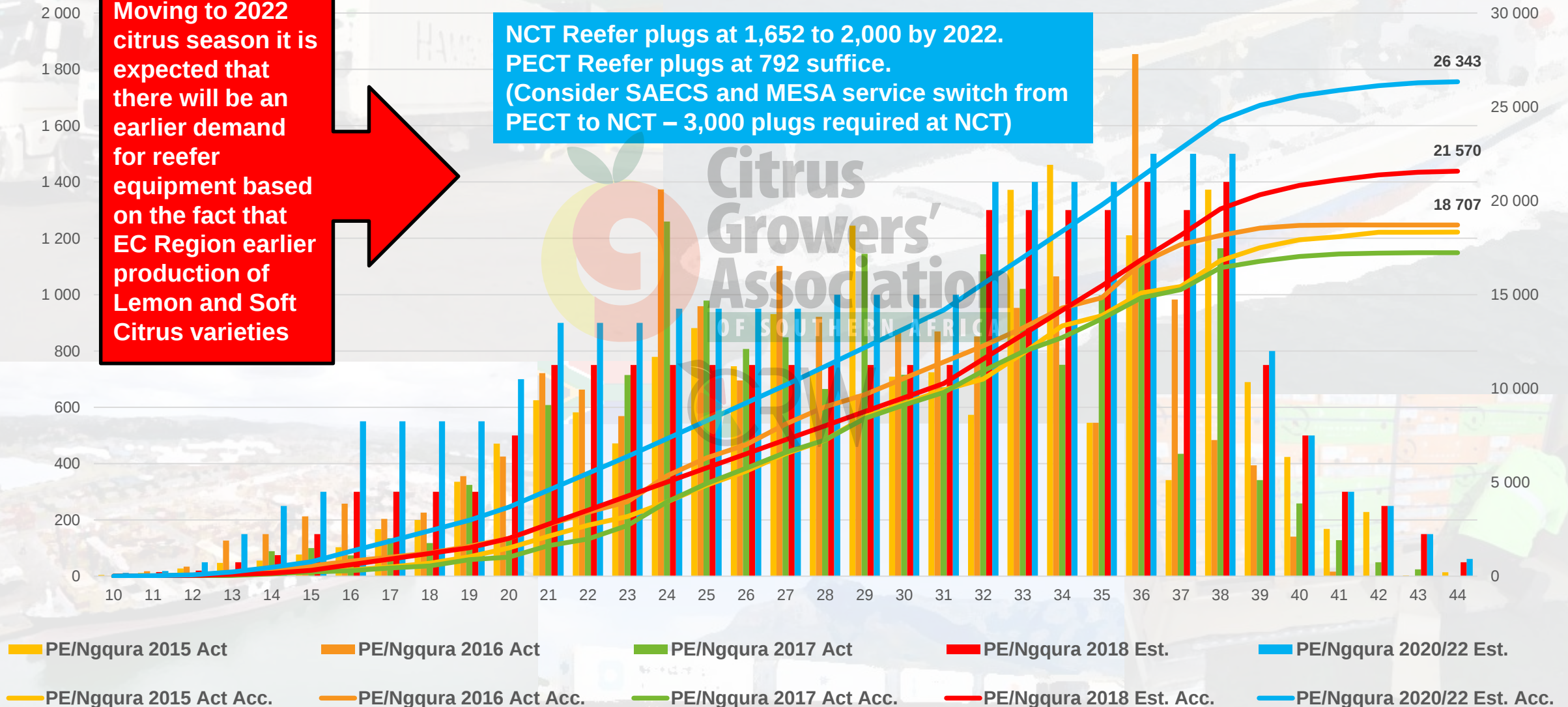


# Outlook on Shipping and Equipment

Citrus Reefers ex PECT/NCT (NCT 70% / PECT 30%)

**Moving to 2022 citrus season it is expected that there will be an earlier demand for reefer equipment based on the fact that EC Region earlier production of Lemon and Soft Citrus varieties**

**NCT Reefer plugs at 1,652 to 2,000 by 2022.  
PECT Reefer plugs at 792 suffice.  
(Consider SAECS and MESA service switch from PECT to NCT – 3,000 plugs required at NCT)**

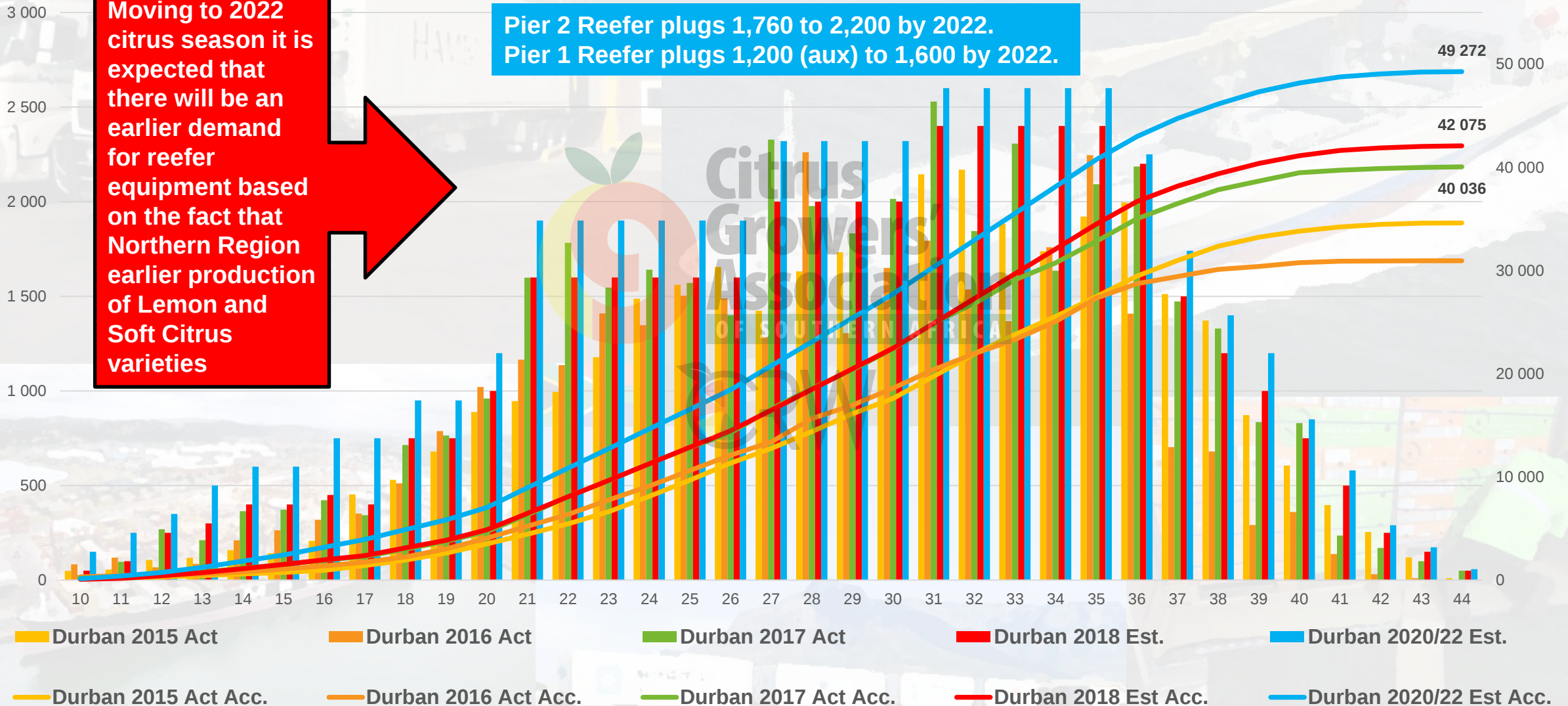


# Outlook on Shipping and Equipment

Citrus Reefer Volume ex DCT (FEU)

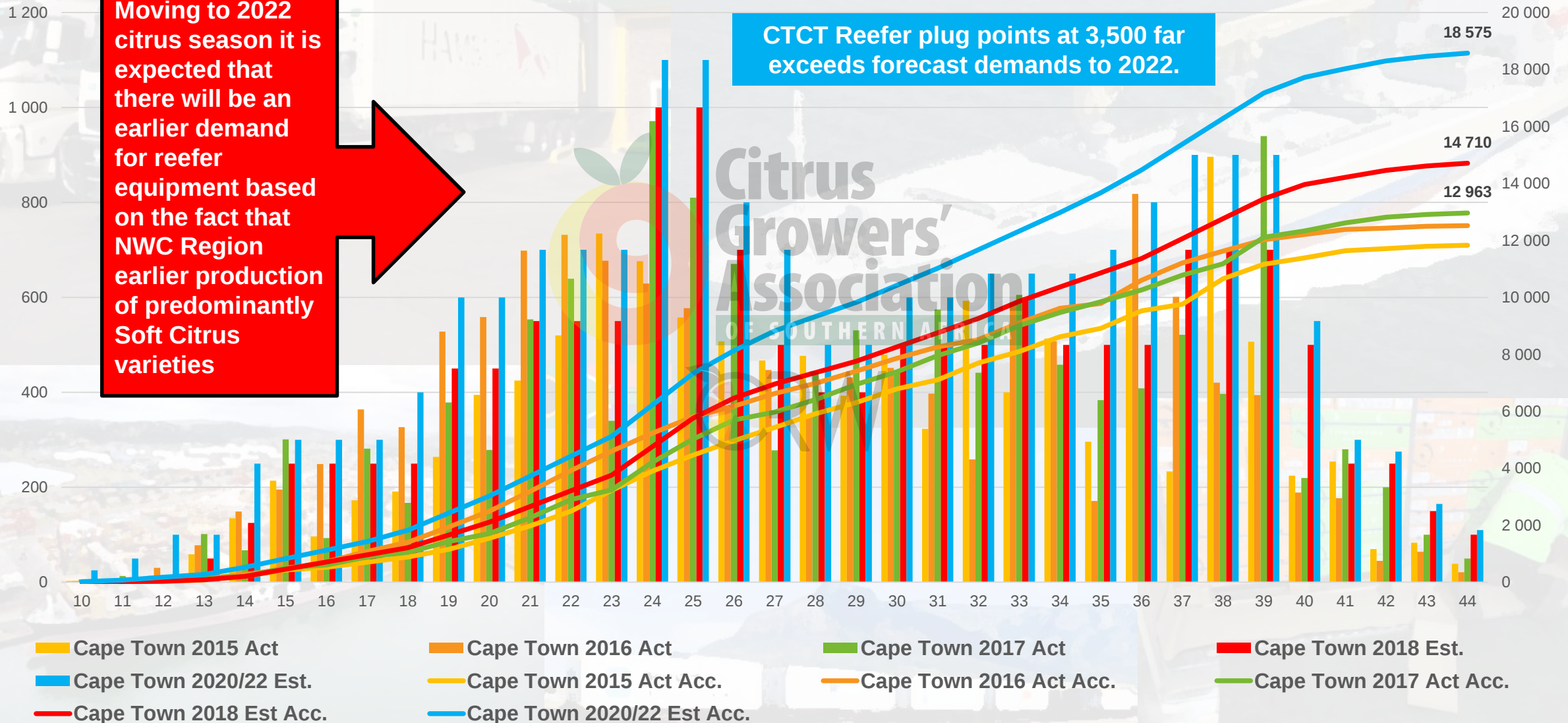
Pier 2 Reefer plugs 1,760 to 2,200 by 2022.  
Pier 1 Reefer plugs 1,200 (aux) to 1,600 by 2022.

Moving to 2022 citrus season it is expected that there will be an earlier demand for reefer equipment based on the fact that Northern Region earlier production of Lemon and Soft Citrus varieties



# Outlook on Shipping and Equipment

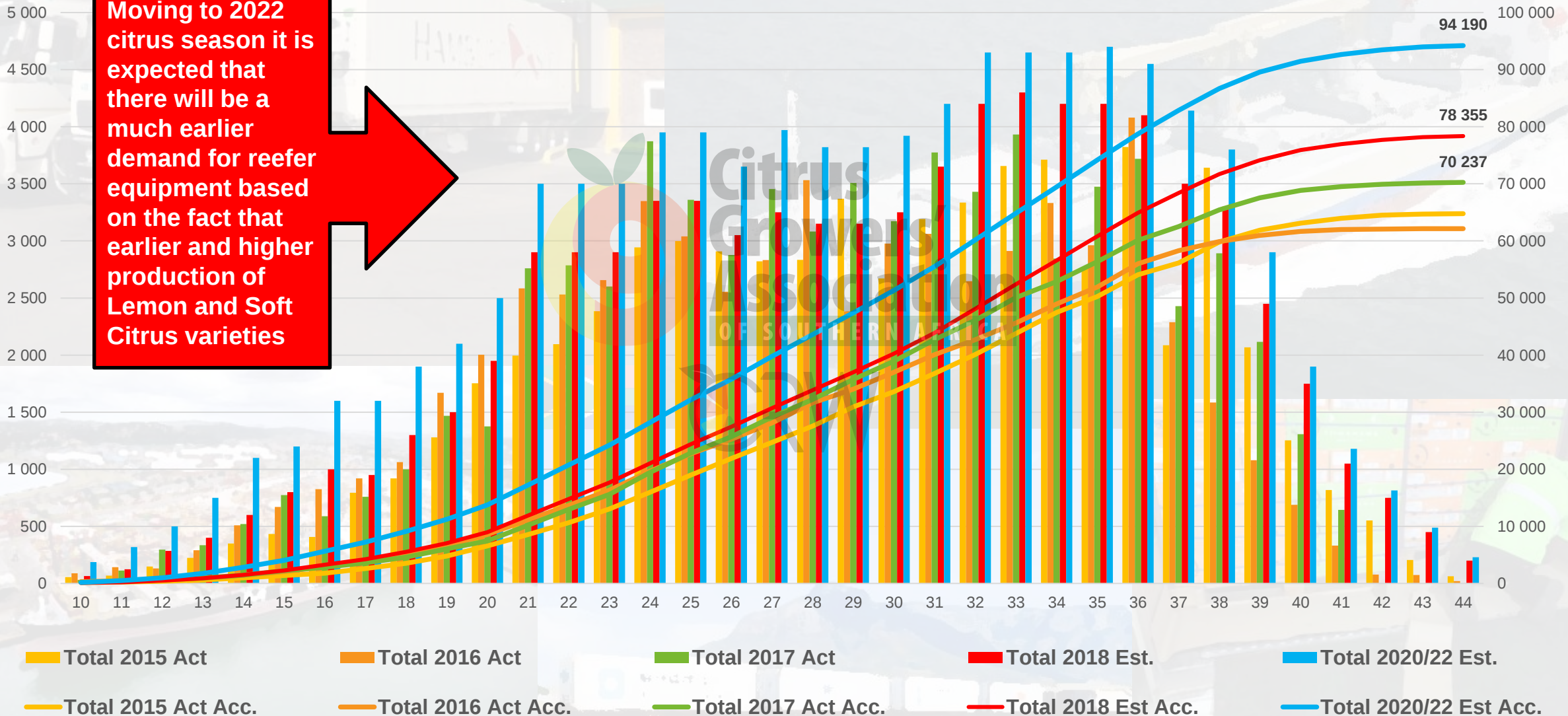
Citrus Reefer Volume ex CTCT (FEU)



# Outlook on Shipping and Equipment

Citrus Reefers ex All Ports (FEU)

Moving to 2022 citrus season it is expected that there will be a much earlier demand for reefer equipment based on the fact that earlier and higher production of Lemon and Soft Citrus varieties



# Outlook on 2018 Logistics Demands

- **Transportation Supply & Demand (Northern Region)**
  - Demand potentially outstrip supply by week 27/28
- **Cold Storage Capacity (Durban & PE)**
  - Durban week 28-34 and PE ominous
- **> Cold Treatment Shipments & Genset units (Durban)**
- **Container Equipment (National)**
  - Additional 7,500 FEU's required 2018 against 2017
- **Port Container Terminal Infrastructure**
  - NB!!! Pier 1 plug points to >1,200 (SAECS & FAX)
- **Port Container Terminal Performance**
  - DCT vessel delays & wind delays
  - DCT & NCT < truck turnaround times
  - DCT effective handling of citrus reefer trains (<TTT)

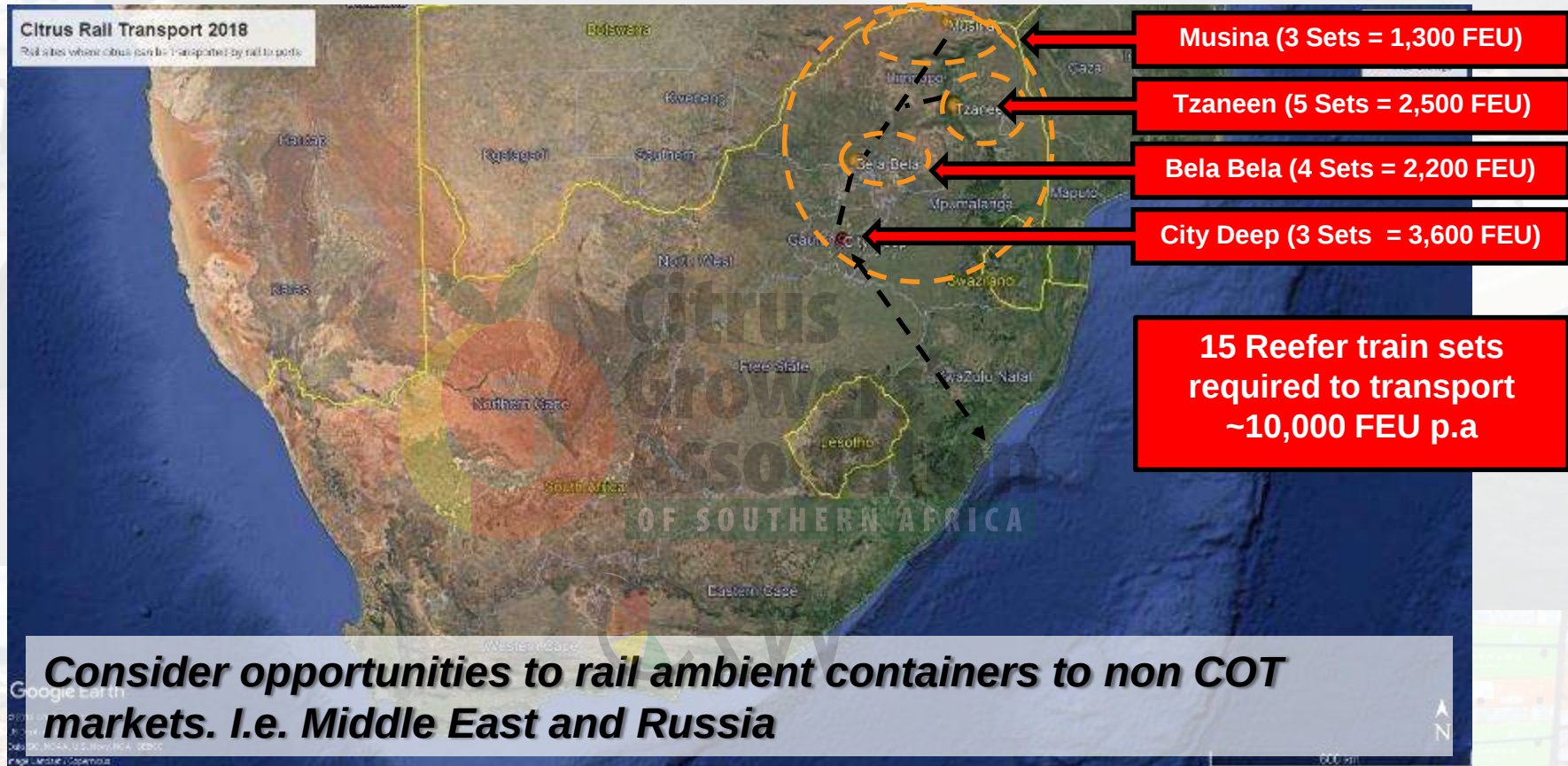


# 2020 Strategic Logistics Imperatives

- **Transportation Supply & Demand (Northern Region)**
  - Rail transportation of 10,000 FEU required to offset 8,000 road truck trips p.a by 2022
- **Cold Storage Capacity Potentially Required by 2022**
  - Durban potentially requires 15,000 pallet slots
  - Eastern Cape / PE potentially requires 10,000 pallet slots
- **> Cold Treatment Shipments - Genset units**
  - SRS co-load to Japan / South Korea / China / India (volume depending)
  - Growth in container volume USA (north), FE and India
- **Port Container Terminal Operational & Infrastructure**
- **Container Line Shipping Capacity – EU / UK / ME / RS / FE / Asia**
- **Container Equipment [Regional] Supply & Timing**
  - 2017 = 69,750 FEU / 2018 Est. = 77,600 FEU / 2022 = 93,600 FEU (+23,850 FEU)
- **SRS EU / UK / RS co-load to offset 400 FEU week 24-38**
- **Exports from Maputo Port**



# Citrus Rail Transport Strategy 2020



1. Musina: Limpopo River & Zimbabwe
2. Tzaneen: Letsitele & Hoedspruit
3. Bela-Bela: Groblersdal & Marble Hall
4. City Deep: All Areas (Ambient for ME/RS & Cold Storage Facilities)

***The target is to rail 10,000 FEU by 2020 to offset 8,000 truck trips per season by 2022***

# 2018 Citrus Export Production Estimates and Forecast Projections

*Thank you / Dankie*



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